1983 MATERIAL

Prospectus for a Subscription Program

Information Markets 1983-1988

Individuals' use of information at home and work.

Planning Services For Management INPUT

We live in the "information age". . . yet the proportion of personal consumption expenditures (PCE) for information has declined in the last five years. At the same time, business information expenditures have grown rapidly.

What is the future for the information markets? The stakes are enormous yet "hard" data is unavailable . . .

. . . THE INFORMATION MARKETS PROGRAM WILL CLARIFY THE INFORMATION PICTURE.

TABLE OF CONTENTS

I SUMMARY

- There are four key questions that this annual subscription service will answer:

  - What information will people want for their business and personal use?

  - How will they use the information; i.e., what are the information applications?

  - How will they pay for the information, or who else will pay for it through subsidies?

  - How will the information be delivered?

- The Information Markets Program will address these questions through:

  - Establishment of a data base of interview data with over 3,000 individuals annually, and an estimated 300 data points per individual.

  - Continuing research on information vendor activities.

  - Analysis of these primary sources and secondary research.

- Each client will receive individualized analysis of development and opportunities through:

  - INPUT's recommendation for specific plans and actions.

  - Frequent reports on vendor, market, and issue topics.

  - Quarterly meeting at client's location; one such meeting will include an annual industry presentation.

  - Continuing inquiry and consulting services.

II CHANGING INFORMATION MARKET BOUNDARIES

> The Information Markets Program (IMP) will enable clients to avoid saturated and problem markets, and to concentrate on the market opportunities. Clients will obtain accurate data on user population changes and forecasts of the information markets. IMP will identify the timing mechanisms and dependencies of new information markets. A prime focus will be the new market boundaries and the resulting competition among hitherto non-competing companies.

Markets fuse while traditional segments blur under the pressures of new technologies and changing distribution patterns. Some vertical markets saturate while new ones appear; the major opportunities of five years ago are now occupied territories. The aggregate statistics become staggering: 4,000,000 terminals in use, 1,500,000 personal computers sold, and more than 1,500,000 persons with programming and operations skills at work in the United States in 1981. More than 8 in 10 senior managers have access to a digital device, be it terminal, telex, word processor, or personal computer. More than half have three or more devices available.

Widespread use of systems and services creates sophisticated business users who have many choices in the way they solve information problems. Many are already users of multiple devices and services which implies increased competition among existing service and system suppliers for business information expenditures.

Yet the changing nature of the business information markets is only the beginning. Even conservative assessments suggest seven million homes with display terminals by 1990, releasing billions of dollars in equipment sales, services, and transaction charges in the next eight years. The delivery systems used for such services can also be applied for business use, further blurring the distinctions among home, business, or personal applications. The emergence of such systems will accelerate movement of

applications (and revenues) among market participants. The effect will be to create "windows" through which new participants can enter, often at the cost of existing participants.

Historically, the overall growth of the information market has insulated competitors in one segment from those in another. Under the pressures of changing distribution and technology that protection will be reduced. Well-established firms may find their traditionally stable markets subject to shrinkage in the future. Others will experience saturation, as has already occurred in mainframe computers, small business minicomputers and batch accounting services.

> The rules of the information game will change dramatically. Clients will understand the new rules through the Information Markets Program.

> The Information Markets Program (IMP) removes the formidable problems created by traditional segmentations by not imposing segmentations *a priori*. Instead IMP will segment *as needed by the client* after the data is gathered through large sample survey techniques. This ensures that a total picture -- unimpeded by inappropriate segmentations -- of information use will be captured.

The fundamental challenge posed is strategic: obtain a detailed understanding of a vast market in flux to identify areas of opportunity and hazard. The first key subtask then becomes market segmentation. Unfortunately, traditional segmentations are inappropriate *because* of the fluid state of the market.

A business information application may be accomplished with a remote computing service, for example, or through a personal computer data base. Classical segmentations by equipment and service type will give application use in each case. But unknown in either case is the *total* use of the application. In this instance a segmentation by application provides a solution to the problem of determining the total use of the application but does not solve the problem of determining the rate of migration between the delivery methods.

Multiply this example by hundreds of possible applications on dozens of types of equipment. Add the fact that some applications cross industries while others do not, and it becomes clear that classical segmentation approaches break down rapidly and may actually impede understanding of market dynamics.

Through the IMP survey of a large population of individuals, clients will receive useful data on the consumption of information across delivery methods.

To provide crucial information on the dynamics of the marketplace (the nature and rate of change), IMP will survey the population annually. After the second survey clients will have -- for the first time anywhere -- true and comparable information on the growth rates and market sizes for all major classes of information products.

With IMP's powerful design, planners and executives will no longer have to rely on fragmented, incomplete and possible inappropriate data for decision making. And since IMP will use the very latest in information technology to collect and analyze the data, the specific questions of individual clients can be answered with ease through fast-response automated systems.

IMP employs state-of-the-art methods and systems to help clients make effective decisions based on sound information and analyses.

IV SCOPE - INFORMATION MARKETS FORECASTS

> The Information Markets Program's (IMP) non-segmented, time-series design provides understanding of today's information markets and points the way to future markets: videotex and other innovative information systems. IMP will isolate and identify the probable users of future information products, their characteristics, and needs. It will gather hard, comparable data on their present practices, plans, and intentions.

Because present users of information technology are familiar with its power and comfortable with its applications, they are prime targets for early adoption of new "mass" systems. But important questions arise from this observation. Are these prime present users "different" in their needs from the general population? If so, how? Given the sophistication of present users, are systems developers "wasting" development dollars and time on unnecessary "human factors" aspects of systems that will never have mass appeal? Or are they under-estimating the barriers posed by "computer literacy?"

Information Markets Program clients will have the answers to these and many other critical questions regarding the shape, size, growth, and needs of future markets. They will have access to the demographic and psychographic data needed to target development and marketing activities. They will understand the positioning of both existing and possible future products, not only in terms of competition from direct competitors but in the fuller context of competition for disposable income.

Data available to INPUT indicates that information products and services are already competing for disposable income. Trade-offs occur between videocassette recorders and personal computer systems purchases, for example. Similar evidence exists for trade-offs between personal computers and motor vehicles. Consistent with its strategic orientation, IMP will examine the parameters of these trade-offs and the competitive environment.

Economic research already completed by INPUT shows that the share of personal consumption expenditures for information and entertainment by consumers dropped between 1975 and 1980. This startling fact is inconsistent with bold forecasts of a golden age of information in which continuing growth is assumed. What are the strategic and tactical implications of the overlooked point? IMP clients will understand them in detail, as well as the hidden implications of heavy information subsidies in the current industry structure.

The Information Markets Program will specifically:

- Forecast business and personal information markets for the next five years.
- Develop strategic scenarios.
- Forecast the applications use of information.
- Provide time-series data on actual user expenditures.
- Compare user forecasts with actual experience.

The Information Markets Program will indicate trends in the use of information equipment, software, and services. It will be coordinated with INPUT's programs on Information Services Markets and Field Services. Forecasts in these areas will be provided through the relevant program.

V PROGRAM METHODOLOGY

Data Gathering: To develop a complete picture of information market structure and dynamics, IMP begins with the smallest possible unit in that structure, the individual user. To identify probable users without regard to industry, age, occupation, or sex -- all typical segmentation variables -- IMP begins with a telephone survey technique known as a "random digit dial." In this technique all U.S. households with telephones (more than 99% of all households) have an equal opportunity to be contacted. This assures the basic statistical soundness of IMP data. From the random dial, those households with incomes in excess of $25,000 per annum are identified. About 30% of all households meet the basic criterion of income.

Establishment of the basic income criterion insures that there will be a high incidence of white collar, managerial, and professional occupations represented. These are the key heavy information consumers. Second, this group will have sufficient discretionary income available to permit purchase of "personal" information products and services. Third, a wide range of occupations and businesses will be included proportional to the population. This proportionality guarantees superior market size and penetration estimates compared to the types of data presently available.

The IMP survey instrument is administered to the population. Through the use of computerized interview techniques a very complex survey may be administered since no respondent is likely to receive all portions of the instrument. On average, an estimated 300 data points will be gathered for each of approximately 3,000 respondents.

This use of consumer market research techniques has not been possible in the past since there were not a sufficient number of users present in the general population. Respondents will be queried about expected home and personal use even if they are not presently using information products in either work or personal contexts. Respondent groups will be interviewed at home and at work.

Research will be carried out with vendors of information, information products, and services. Third parties including government, education, and association entities will also be included.

IMP's innovative data gathering methodology guarantees the acquisition of a broad spectrum of data at a high level of resolution. These data qualities are the foundation on which the powerful IMP analytic and reporting structure is built.

Data Analysis: The construction of appropriate segmentations of use to clients is an early task in the data analysis phase. Segmentations can be constructed for the total market by information application, industry, size of firm, occupation, respondent's demographics, intentions and plans, as well as a number of other variables. The data and segmentations can then be subjected to rigorous analysis by any of a variety of techniques, including the most advanced statistical methods. The purpose of these analyses is to produce a series of reports which outline market dimensions, boundaries, shares, and structural relationships with practical, usable insights, and conclusions.

Reporting: Clients receive four separate types of reports.

- The annual Information Industry Report contains basic survey results covering respondents' information use, needs, attitudes, and demographics. Market share and market direction information are critical components. Opportunities and threats for each "sector" along with recommendations for offensive and defensive strategies are included. Empirically derived forecasts by information type and application are presented.

- Two Issues Analysis, in-depth reports covering cross-sector factors which impact market growth. Such reports will emphasize the characteristics of users, their plans, and intentions. These will be of particular interest to planners charged with new product and new market development.

- Two Demand Analysis reports present current and expected usage levels for various information types and applications. These reports will be of particular value in short-term tactical planning. They will be particularly useful for assessing market gaps which can be filled with modified existing information products.

- Two Vendor Analysis reports furnishing clients with a full assessment of the profile, strengths, and weaknesses of significant vendors in each market sector. User satisfaction levels, specific application data, plus plans and intentions data will be provided.

Flash Reports

Clients will also receive summarizing key vendor, market, and technology developments as they occur through "flash" reports. These reports will also include interim findings, work-in process, and early trends in the data. On-line "flash" reports will be available to clients through an electronic mail system. The use of E-mail permits the establishment of an on-going "teleconference" between INPUT and its clients and, to the extent desirable, among clients.

Conferences

The Information Markets Program also includes an annual client conference. The first conference at program commencement will provide clients with the opportunity to participate in the structuring of the program specifics, review questionnaires, and interchange views on market directions for program testing. The second conference will take place in late 1984 to review and summarize the results of the first two survey waves and discuss the program findings to date.

Meetings

Senior INPUT program staff will meet with each client once a quarter to discuss industry data, events, and trends as they affect the client. The client's plans and

concerns may be discussed on a confidential basis and INPUT's recommendations presented.

Presentations

Each client will receive an individual annual presentation on the program findings as they apply to that company. Each client's questions for the following year will be determined.

Inquiry Services

Clients may consult via telephone, electronic mail, and in-person with INPUT staff engaged in the program. Arrangements for custom analysis on the Information Markets data base can be arranged on request.

VI SCHEDULE

- The Information Markets Program will commence in January 1983. The schedule for 1983 is:

  - Client conference in New York - January.

  - First survey wave incuding testing and data base establishment - February-April.

  - Demand Report #1 - April.

  - Vendor Report #1 - May.

  - Issue Report #1 - June.

  - Annual Data Base - July.

  - Issue Report #2 - September.

  - Demand Report #2 - October.

  - Vendor Report #2 - November.

  - Client presentation - September.

  - Client polling and planning - November-December.

  - Client inquiry and support service - continuous.

  - Events Monitor and Flash reports - as appropriate.

ACT NOW . . .

You need a continuing reliable source of data in information markets. The Information Markets Program will clarify the direction for your success. Your early commitment will enable your interests to be involved as much as possible in the program structure, and your questions to be considered first

. . . THE INFORMATION WORLD CHANGES WHILE YOU CONSIDER THIS.

INPUT

Planning Services for Management

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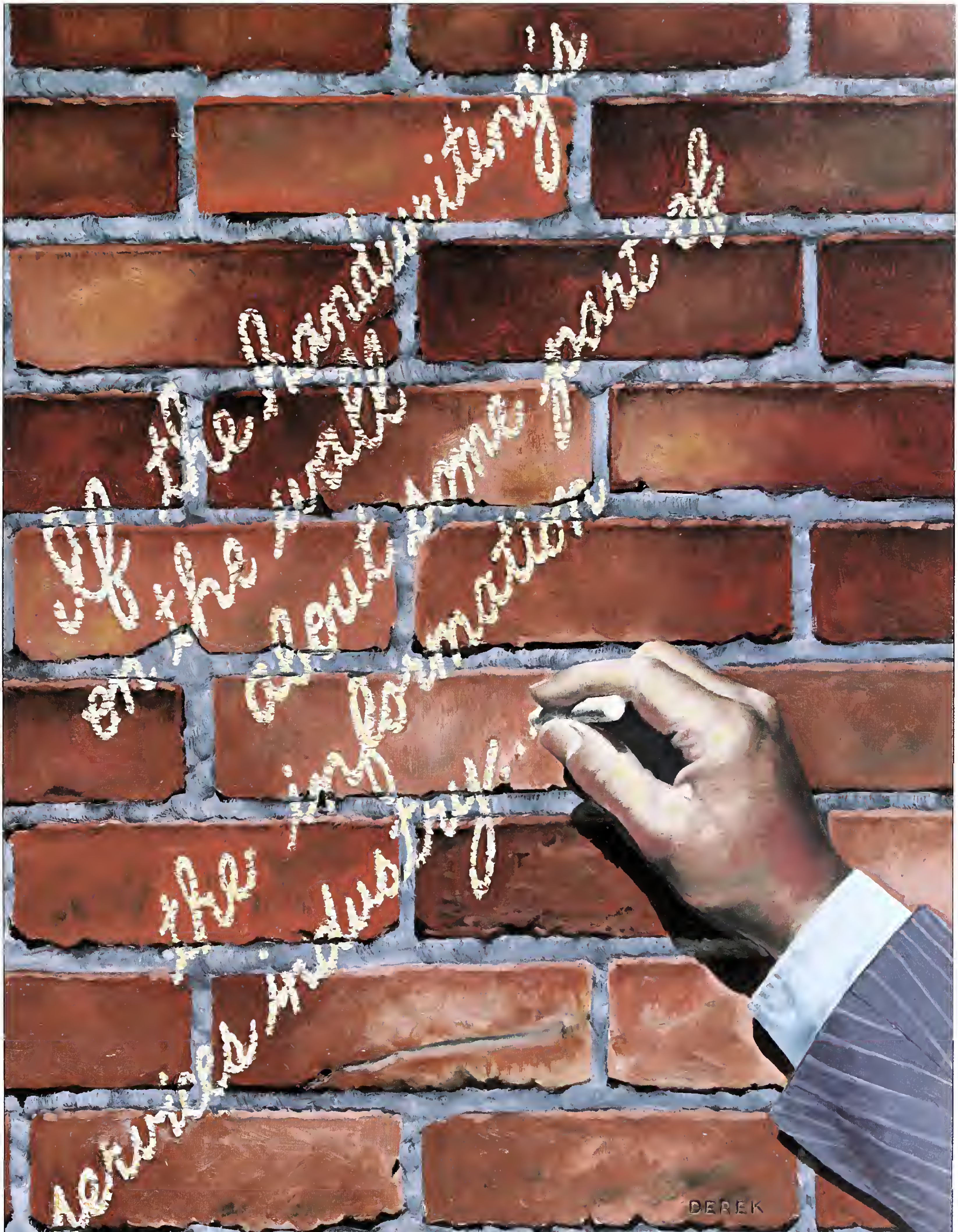


INPUT
The Information Future

. . . INPUT's 1983 ADAPSO Report Can Help You Read It— Loud and Clear

WHAT'S GOING ON OUT THERE?

One information services executive summed up the problem well when he commented, "We just want to know what's going on out there. How are we doing compared to the rest of the market? How—and what—is the competition doing? And how healthy is the market itself?"

INPUT has the answers. In a report researched on behalf of the Association of Data Processing Services Organizations (ADAPSO), INPUT examines broad trends in revenue growth, profit margins, market growth, changes in the competitive environment and more in the four major sectors of the information services industry.

Called the *1983 Information Services Industry Report*, the study is the only document of its kind sanctioned by ADAPSO. It is the end result of months of research involving hundreds of interviews, including a complete census of companies with over $10 million in sales. And it gives you the kind of information you must have to plan effectively in one of the fastest moving markets in the world.

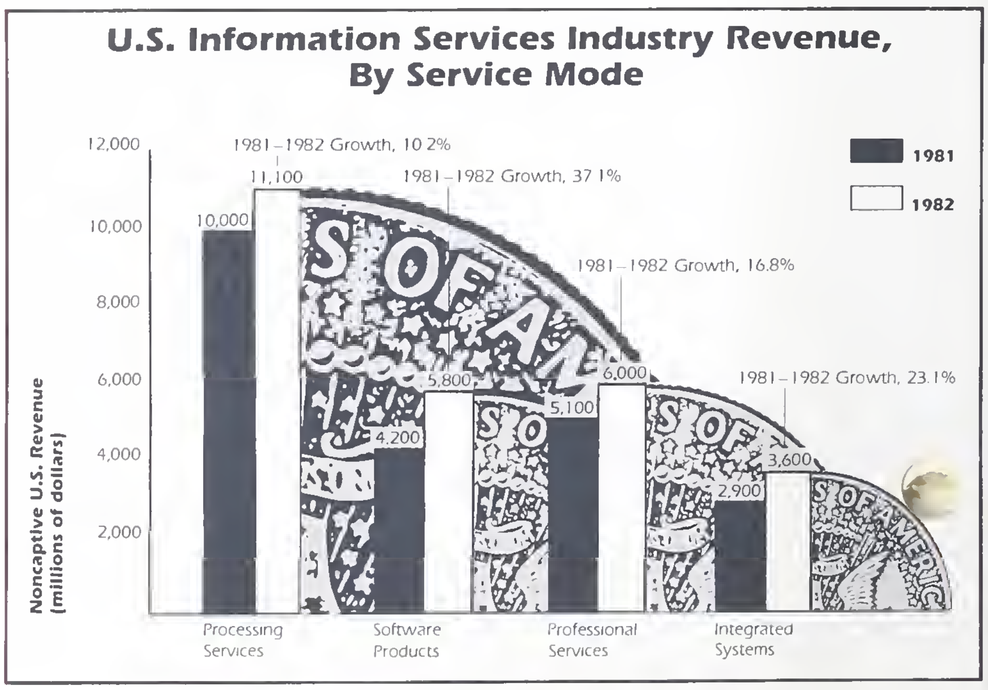
THREATS AND OPPORTUNITIES

In the report, INPUT breaks the market down into four delivery modes: processing services, software products, professional services, and integrated systems. Within each of these, INPUT looks at three major divisions in company size (e.g., under $1 million, $1 to $10 million, and over $10 million), and a number of different types of products and services.

Then, for each subsection, INPUT tracks:

- Overall revenue and revenue growth;
- Number of employees and employee growth;
- Productivity figures, and percent change from 1981 to 1982;
- Pretax profit margins;
- Percent of the total revenue for each delivery mode accounted for by different types of companies, and how that has changed from last year; and

a host of other indicators that help you get a feel for what forces are shaping the various information services markets, and how those forces can threaten your business, or provide you with opportunities for growth.



FOCUS ON PLANNING

The data themselves are extremely useful for a general interpretation of this tumultuous market. But INPUT takes them one step further, focusing them on specific planning issues to help you uncover overlooked market demand, and avoid costly planning errors.

Among the questions the report will help you answer are:

- How is your company doing relative to others of the same size?
- What is the overall size of the four major market sectors, and how are their performances indices changing from year to year?
- What is the competition doing, and where are they doing it?
- Into which market sectors might it be profitable for you to diversify?

A CLOSE LOOK

INPUT's *1983 Information Services Industry Report* is a systematic examination of the industry, with special emphasis on revenue trends and changes in market size and growth rates. INPUT presents its analysis in more than 50 tables with explanatory text, covering the following areas, among others:

- Industry revenue totals by type of company;
- Industry revenue totals by service mode;
- Average revenue per employee, by type of company;
- Pretax profit margins of public companies, by service mode;
- Industry revenue totals by company size;
- Revenue distribution within service modes by type of company;
- Revenue growth within service modes by type of company;
- Impact of price increases and acquisitions on growth by type of company.

For a complete list of these tables call INPUT today.

- How is the market sector in which you do most of your business doing relative to the other three?

And others, including everything from the proportion of business the various sectors do in foreign countries, to the opinions of other information executives about the industry's future direction.

ANSWERS YOU HAVE TO HAVE

INPUT's *1983 Information Services Industry Report* is the only source for this kind of large-scale treatment of the information services market. It was compiled in an intensive data-gathering operation that involved INPUT's trained research staff for months, and it answers the kind of questions *you* have to have answered to guide your business through the rapid changes ahead.

Is the handwriting on the wall about some part of the industry? If it is, you have to know about it. And INPUT has the report that examines the market in such a way that industry trends become clear, enabling you to make decisions about your company's future direction with confidence.

Call us today for more information, or see the enclosed order card.

"It was an intensive data-gathering operation, involving trained researchers for months."

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MARKET ANALYSIS AND PLANNING SERVICE (MAPS)
Executive Bulletin

Volume 2, Number 2

1983 Income: Software Soars, Processing Services Plummet

The last three quarters of 1983 brought improving net income for all sectors of the information services industry except processing services. Income for processing service companies has fallen at an increasingly rapid rate.

This issue of INPUT's Market Analysis and Planning Service (MAPS) Executive Bulletin reviews the performance of the processing services, software products, professional services, and integrated systems sectors of the information services industry.

Part one of this bulletin reviews the net income and return on revenues for these sectors. Part two is a copy of the April 1983 issue of INPUT's Vendor Financial Watch (VFW). The VFW is a quarterly compilation of public information service industry companies. It reviews revenue and income by quarter and year, as well as growth rates for the same periods. This information is presented by sector and for the entire industry.

Part One: Many Happy but One Sad Return

Return on revenue measures the net income per revenue dollar. Exhibit I shows this measurement for each sector from 1981 to 1983. Exhibit 2 compares the growth of the return on revenue by quarter (e.g., 1983 return in Quarter I compared to 1982 return in Quarter I, for a given service sector), thus highlighting the rate of growth or decline.

The processing service company group has experienced a severe decline in return on revenues in 1983. In the first quarter the return was 8.8%, which was close to its three-year high of 9%, set in first quarter of 1982. In the fourth quarter the return on revenue fell to a three-year low of 1.5% (see Exhibit I). Income for this sector

appears to be cyclical but revenues have not exhibited this (see part two - VFW). Exhibit 2 dramatically shows the quarter-by-quarter decline in return on revenue growth. Each quarter in 1983 was below 1982 return figures, culminating in a 78% decline in the fourth quarter. This sector's results are heavily influenced by the poor income results of Tymshare (-118%), Anacomp (-1078%), Bradford National (-2083%), Computer Network (-680%), and Dyatron (-528%). In particular, Anacomp greatly contributed to the decline.

Anacomp lost almost $60 million in calendar 1983, over half of this loss occurring in the fourth quarter. Anacomp attributes most of its losses to problems in the software products sector of its business (software represents 32% of Anacomp's revenues). The return and growth of return for the processing service company group (excluding Anacomp) is shown by a dotted line in Exhibits 1 and 2. Note that without Anacomp, the decline is much less severe. In the fourth quarter, for example, the return on revenue rises to 6.5% and that quarter's growth declines only 12% from 1982.

After a slow start in the first two quarters, software products vendors' return on revenue soared to a three-year high of 11.4% in the fourth quarter (see Exhibit 1), representing a 74% growth over the fourth quarter of 1982 (Exhibit 2). Income growth was strong, with only a few exceptions. The most notable exception was Comserv, whose income and revenue growth were -328% and -35% respectively from 1982. More typical is the improved performance over 1982 of ADR (57% income, 30% revenue) and Cullinet (50% income, 55% revenue).

Professional service companies also posted a three-year high for return on revenues in the fourth quarter (4.1%, see Exhibit 1). This sector had a number of companies with excellent income growth in 1983: AGS (133%), American Management Systems (189%), and Computer Horizons (315%). A few companies, however, had poor income performance in 1983: ACT (-39%), and Rand Information Services (-103%).

Integrated systems exhibited a dramatic turnaround in income and return on revenue performance in the last half of 1983. This sector had a protracted slide in return on revenue from its recent high of 13.1% in the second quarter of 1981 to 5.2% in the first quarter of 1983. Since that time, the return has risen to about 9% in the third and fourth quarters of 1983. This has heralded the end of net income contraction and a possible return to healthy, sustainable growth. Many companies (though some are small in size) had excellent income growth in 1983: ASK (63%), Gerber (217%), Intergraph (126%), and Reynolds and Reynolds (73%). There are some companies showing sharp income declines but remaining profitable (Triad -64%), while others not only had an income decline but also were unprofitable in calendar 1983

(National Data Communications -153%, \$2.5 million loss; Tera Corporation -131%, \$1.8 million loss).

Overall, the return on revenue and income recovered from a relatively poor first quarter and improved throughout 1983 for all sectors except processing services.

Part Two of this bulletin contains the Vendor Financial Watch. It provides detailed revenue and income for each of the sectors discussed above, as well as company income, revenue, and growth data.

EXHIBIT 1

RETURN ON REVENUE BY QUARTER
PUBLIC INFORMATION SERVICES COMPANIES

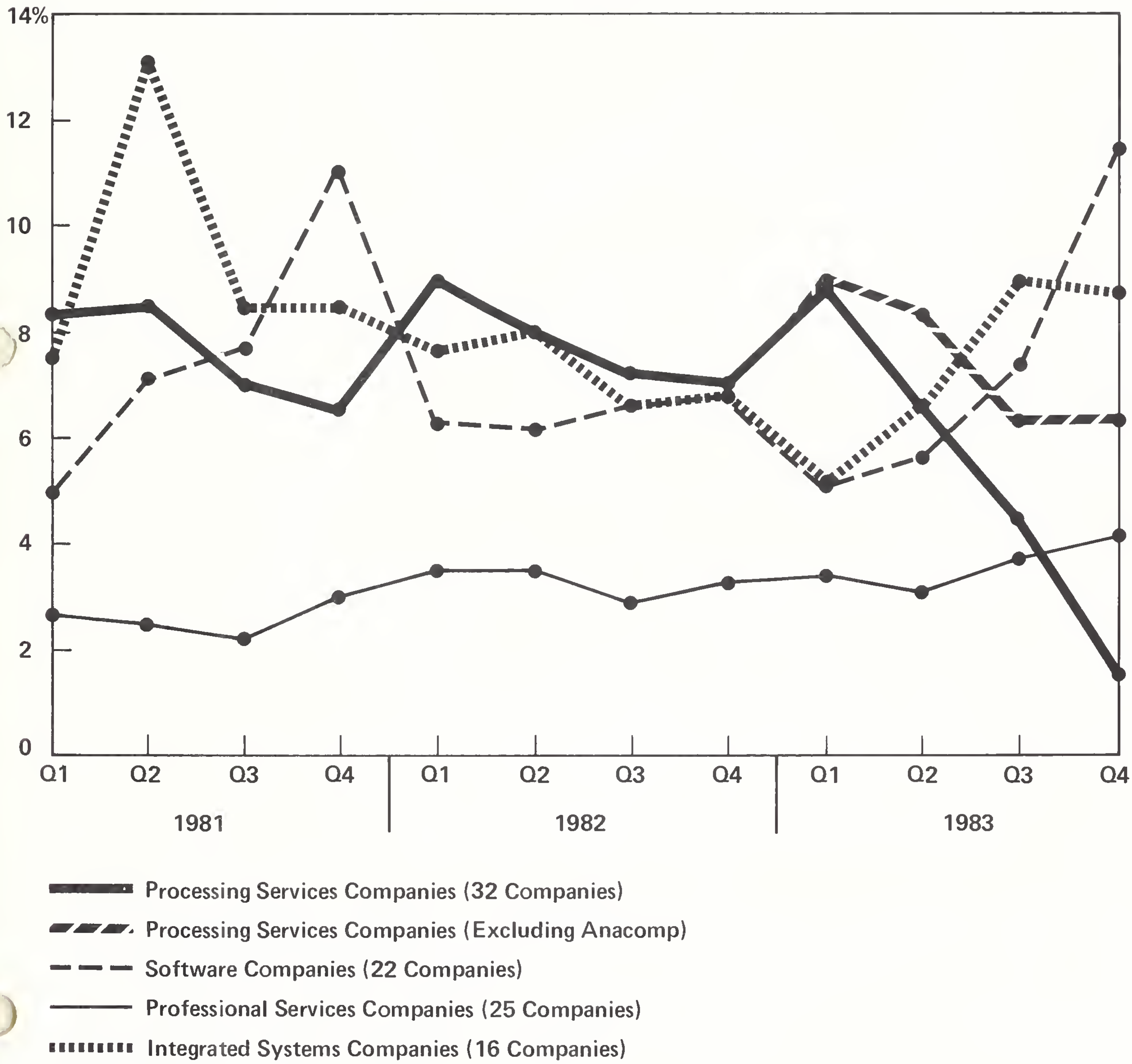
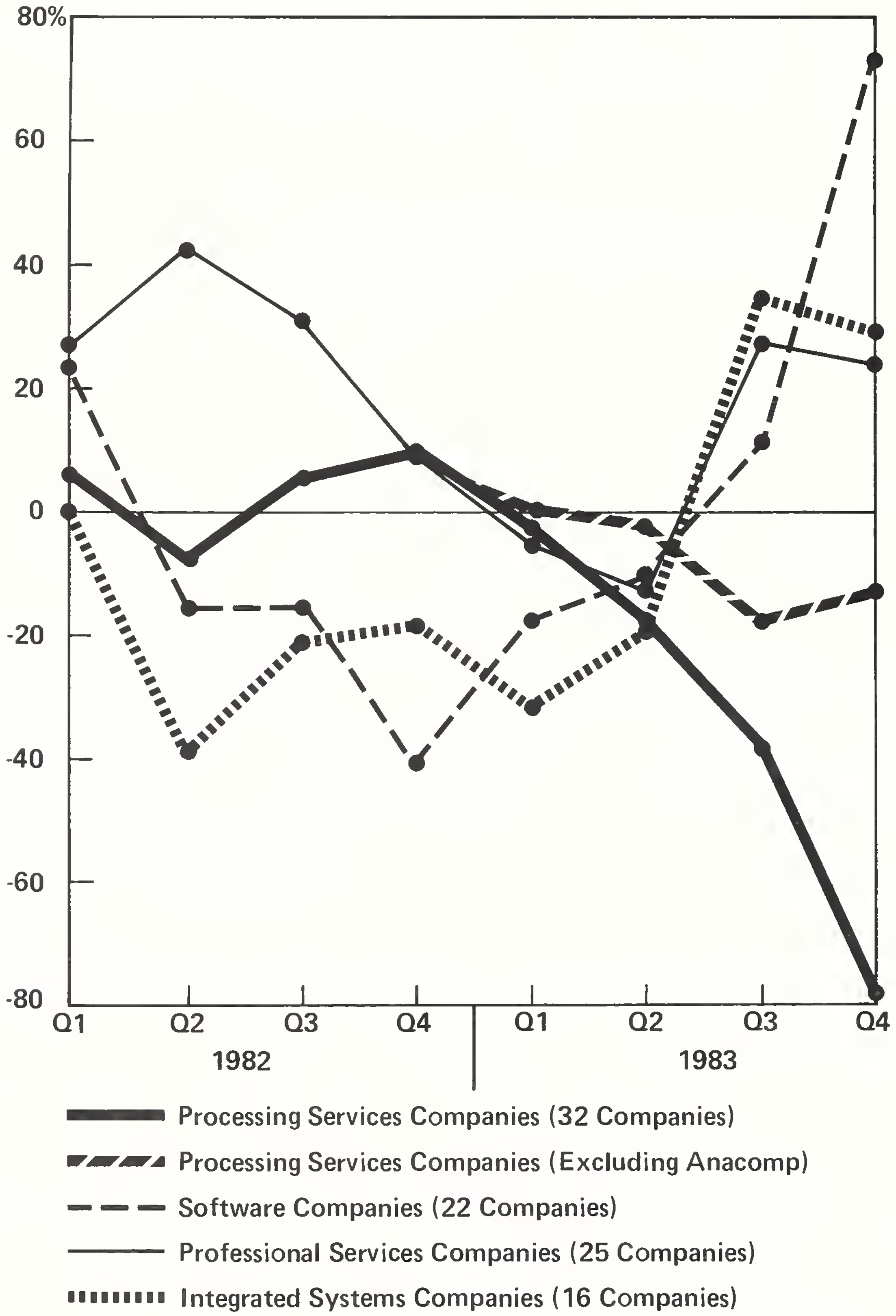


EXHIBIT 2

YEAR ON YEAR QUARTERLY GROWTH IN RETURN ON REVENUES
PUBLIC INFORMATION SERVICES COMPANIES

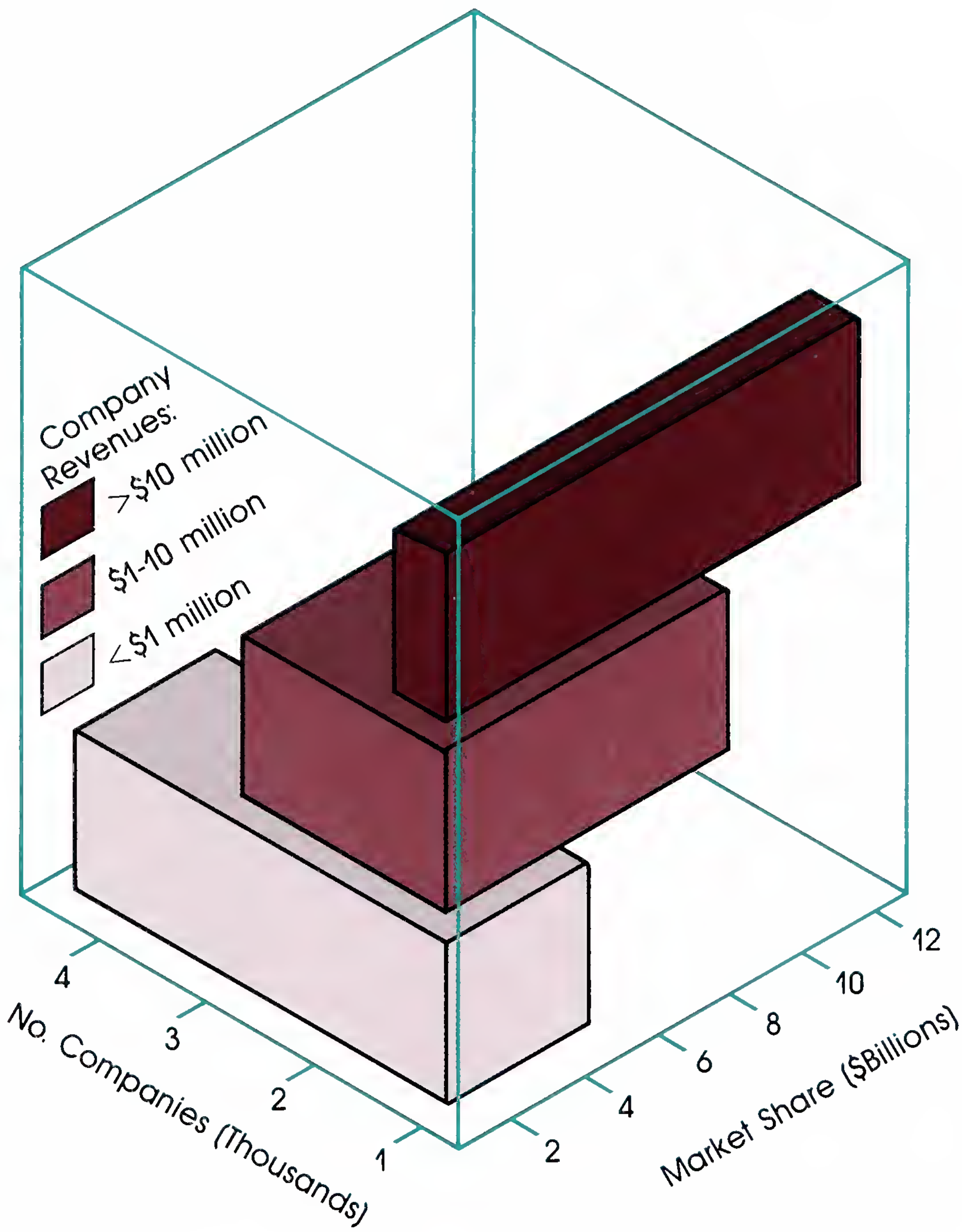


This INPUT Executive Bulletin is published as part of the Market Analysis and Planning Service. For more information on this bulletin, or on this or any other INPUT program, contact INPUT at 1943 Landings Drive, Mountain View, California 94043, (415) 960-3990.

1984 MATERIAL

INPUT®

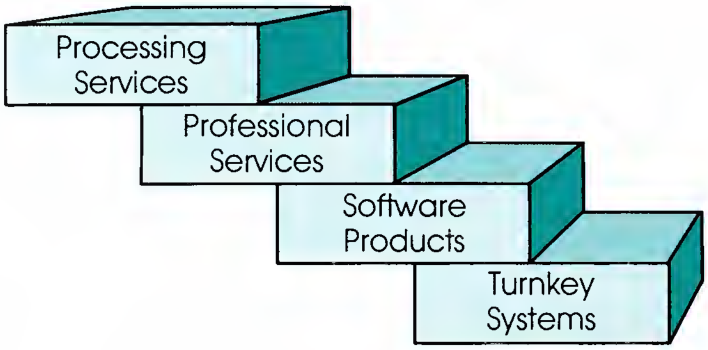
Information Services Market Structure



Company Analysis and Monitoring Program (CAMP)

Competitive Analysis • Acquisition Planning
Financial Performance • Markets • Products

Company Analysis and Monitoring Program (CAMP)



CAMP — A full-service program of reliable, up-to-the-minute intelligence on information services vendors.

Competitive analysis and acquisition targeting is tough in a field that's moving as fast as the information services industry — growing at over 20% per year to reach more than $120 billion by 1990.

To do it well, you need comprehensive, reliable, and up-to-the-minute vendor research. And you need that research to be as accessible as your telephone or a volume on your shelf.

Covering more than 4,000 public and private companies active in the information services industry, INPUT's Company Analysis and Monitoring Program gives *you* the information *you* need — when *you* need it:

- **Daily —** access to a team of information services specialists who provide prompt turnaround on *your* information services vendor questions.
- **Monthly —** detailed descriptions on key companies; what they sell, whom they sell to, where they are, how big they are, and more . . .
- **Quarterly —** vendor financial watch bulletins track the latest acquisitions and mergers, and analyze the most recent financial data of public companies.
- **Annually —** INPUT directory of more than 4000 information services vendors in the U.S.; includes indices on services offered, industry sectors served, and geographic areas covered.
- **On Request —** special computer searches of the directory data base according to customer parameters, plus access to INPUT's extensive information services industry library.

Program Services

Directory of Information Services Companies

For more than 4,000 active vendors, the directory provides name, address, telephone number, chief executive officer, recent financials, and types of services offered; indexed by type of service offered, industry markets targeted, and geographic markets served.

Vendor Financial Watch (VFW)

VFW analyzes on a quarterly basis all mergers and acquisitions in the computer/communications and information services industries.

Quarterly comparison of revenues and net incomes of over 100 public companies are presented — including processing services, professional services, software products, and turnkey systems vendors.

VFW allows *you* to make vendor-to-vendor comparisons and to track the overall growth of each market sector and the information services market as a whole as it happens.

Hotline Inquiry Service and Support

Access INPUT's Hotline telephone consultants for prompt and individual research on specific questions about vendors.

Company Profiles

Company Profiles, detailed descriptions of key vendors, distill masses of information gathered from interviews, public documents, and statistical analysis into:

- **Market Analysis —** Whom does a given company sell to? What do they sell? How much? What percentage of their revenue is derived from various market sectors? The CAMP profiles tell *you* all of this.
- **Five-Year Revenue History —** For Public Companies — revenue, earnings per share, income before taxes, and net income for the last five years are presented;
  For Private Companies — current year revenue is presented.
- **Competitive Review —** Who are the competitors of a given company? INPUT gives you the company's answer, and our answer, along with reports of recent contract activity.
- **Product and Service Analysis —** CAMP examines in detail what kinds of products and services a given company sells.
- **Organizational Structure —** How many employees does a company have? How many divisions? What do the divisions do? — and more — are all covered in CAMP.

In addition, the Company Profiles tell what kind of computer hardware and software the company uses to provide its products and services, how many and where its field offices are, and what geographic markets it covers, among other topics.

INPUT's CAMP includes profiles for more than 300 information services vendors — all updated annually.

Vendor Library Files

INPUT maintains over 4,000 library files of current research material on vendors in the computer industry for CAMP subscribers. Product and service literature, reports, clippings, and other research material can be requested for shipment, or clients can use the files in person at INPUT's offices.

Data Base Access Service (Optional)

As a CAMP subscriber, *you* may obtain special vendor data base reports according to *your* search parameters — selecting from the entire data base. Parameters may be selected from any of the data elements of the data base; e.g., "select all software companies serving the medical industry and having more than 100 employees or $6 million in total revenue."

CAMP: The Right Business Tool to Meet the Challenge

Competitive analysis and acquisition targeting are tough problems indeed — unless *you* have the right business tools to solve them.

INPUT's CAMP is designed to give *you* those tools now — at a fraction of the costs you would incur to develop them in-house.

Use the Company Analysis and Monitoring Program to meet *your* strategic planning challenges. See the enclosed authorization form, or give us a call today.

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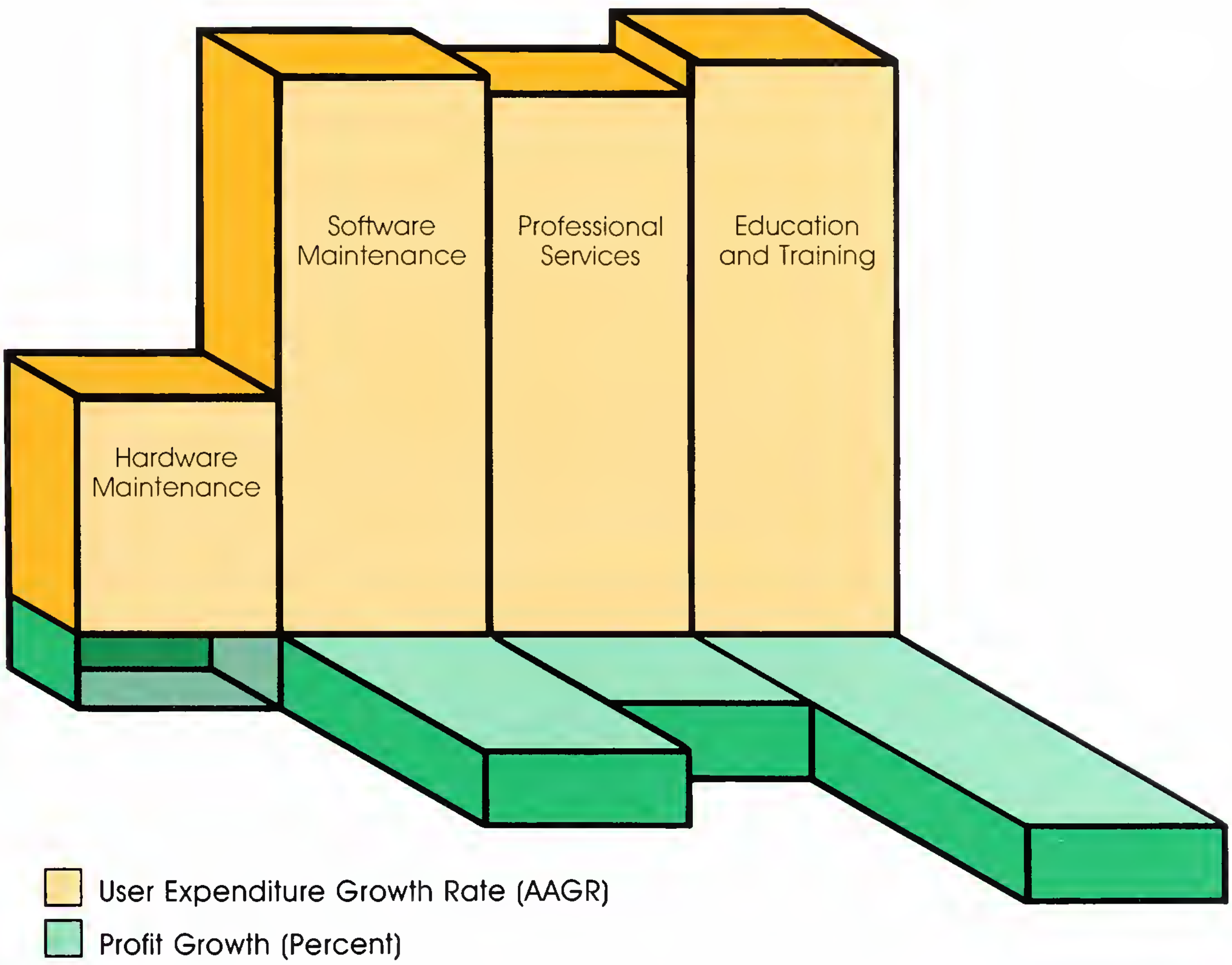
INPUT®

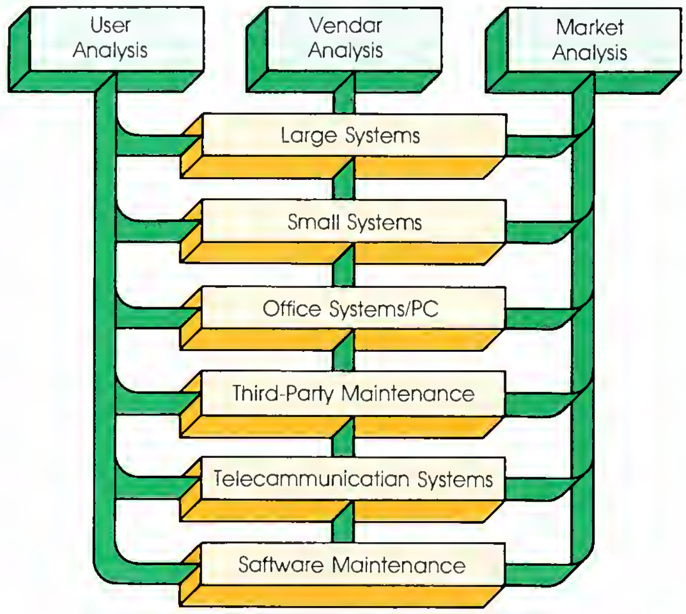
Customer Services Profit Potential
1984-1989



Customer Service Program (CSP)

Large Systems • Small Systems • Office Systems
Software Maintenance • Telecommunications • Third-Party Maintenance

Customer Service Program (CSP)



INPUT's Customer Service Program (CSP) provides the information *you* need on these critical customer service markets:

- **Software Maintenance and Support**
- **Telecommunications Systems**
- **Large Systems/Mainframes/Plug-compatible Peripherals**
- **Small Systems/Minicomputers**
- **Office Systems/Personal Computers**
- **Third-Party Maintenance**

You receive reports and services which focus on questions *you* must have answered to guide *your* customer service organization through the changes ahead:

- What do your users really require, and how can you meet their needs most efficiently?
- What is the competition doing and how can you respond?
- Where are the sources of revenue growth for the next five years?
- How will increases in hardware reliability and software complexity affect your personnel mix?
- What are the new service techniques, and how are they being received in the marketplace?

INPUT's CSP helps *you* answer these and a host of other questions that can spell the difference between profit and loss, market growth or stagnation, and customer satisfaction or dissatisfaction.

CSP — The top-flight research you need to compete in today's "total support" customer service environment.

Client Support

Continuous support is provided to CSP clients through:

- **Hotline Inquiry Service and Support** — Hotline telephone consultants turn *your* questions around fast — giving *you* the answers you need, when you need them.
- **Access to Senior Staff** — INPUT's senior analysts are a reservoir of information and decision support. Many have over 20 years of experience analyzing the computer/communications industry.
- **Library Access** — INPUT maintains library files on over 4,000 information technology vendors. Those files are open to you when you subscribe to CSP.
- **Regional Client Conference** — In this joint meeting, get down to brass tacks with industry experts, INPUT's senior customer service analysts, and other customer service managers about the issues of most concern to *you*.
- **Client Presentation (Optional)** — A presentation by INPUT's top management highlighting the results of the year's research, and analyzing the major trends in customer service. These are confidential, in-house meetings focused on *your* needs.

Comprehensive Analysis

CSP — a comprehensive analysis of hardware and software service in the U.S. — highlights market sizes and growth, key issues and trends, vendor developments and more for five critical markets:

- Telecommunications Systems service markets
- Large Systems/Mainframes/Plug-compatible Peripheral service markets
- Small Systems/Minicomputers service markets
- Office Systems/Personal Computer service markets
- Third-Party Maintenance markets

The results of CSP research — more than 1300 telephone interviews, in-depth customer service organization interviews, plus review of more than 4000 information technology vendor files — are presented in three research areas:

- **Market Analysis Research** — complete examination and analysis of the five customer service markets, including:
  - Current and future market size
  - Development trends
  - Revenue opportunities
  - Tactical and strategic recommendations

- **User Analysis Research** — for all five markets described above, INPUT examines user:
  - Service requirements
  - Ratings of services provided by current suppliers of both hardware and software
  - Attitude toward remote support services
  - Evaluation of post-sales support requirements (including software maintenance and third-party maintenance needs)
  - Attitude toward service pricing

- **Vendor Analysis Research** — examines service activities for all five markets and includes vendor:
  - Successes and failures
  - Marketing strategies
  - Pricing analysis
  - Contractual options
  - Profitability

  Plus, complete descriptions of the:
  - Top 30 Large Systems, Small Systems, and Office Systems Vendor Service Organizations.
  - Top 20 Telecommunications Systems Vendor Service Organizations
  - Top 30 Third-Party Maintenance (TPM) Suppliers

INPUT's Customer Service Program: The most comprehensive planning service available today to face the issues that will affect *your* business tomorrow.

Flattening productivity curves, corporate pressure for greater profits, rapidly changing user requirements — only INPUT can give *you* the focused research *you* need to meet these challenges.

Put the customer service program to work for *you* by calling us today, or by completing the enclosed authorization form.

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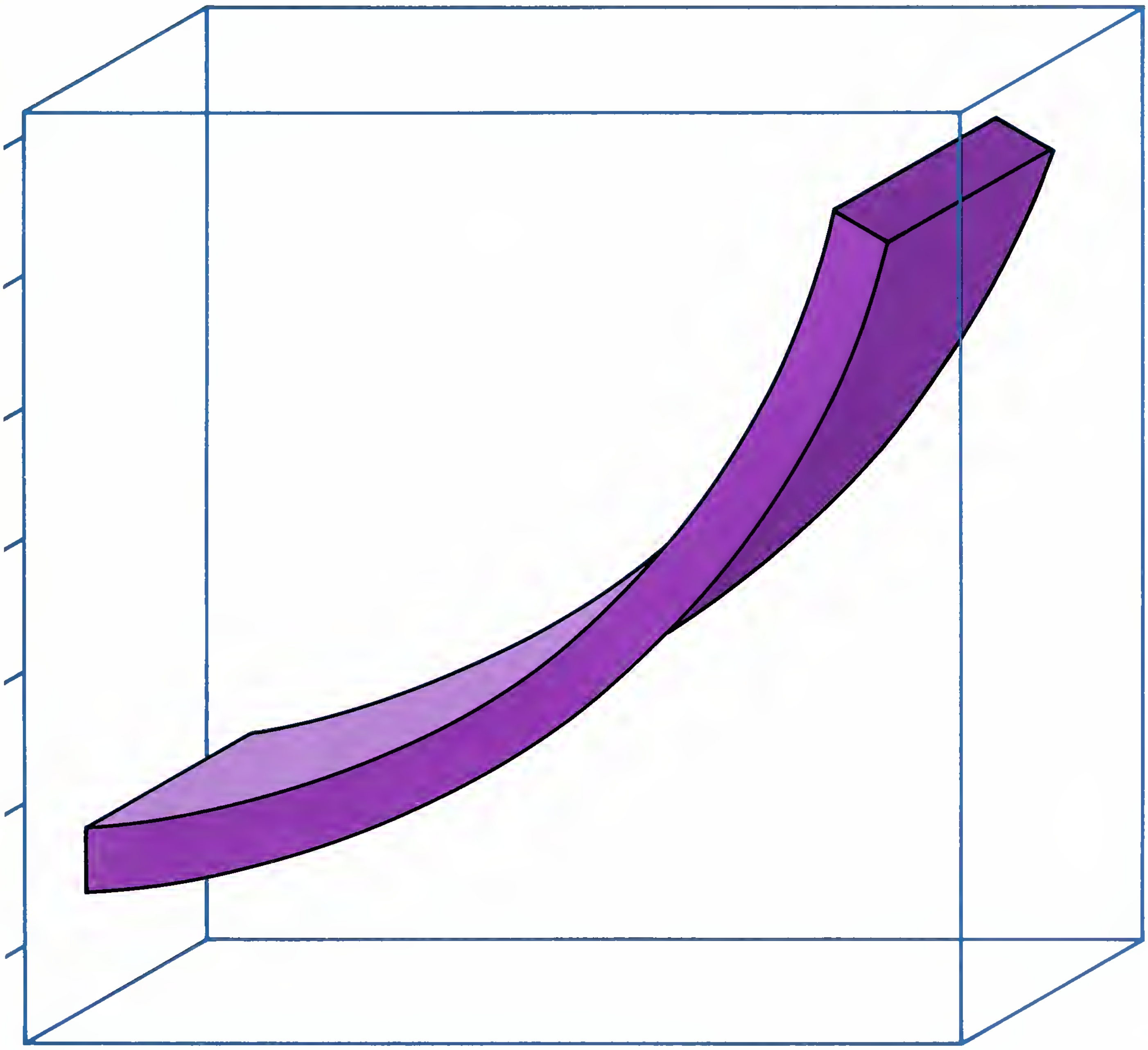
INPUT®

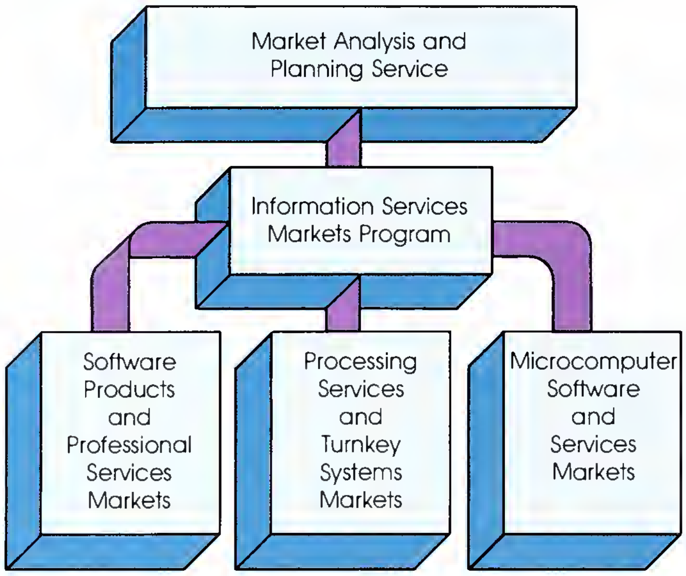
U.S. Information Services Market



Market Analysis and Planning Service (MAPS)

Vertical and Cross-Industry • Software and Professional Services
Processing Services and Turnkey Systems
Microcomputer Software and Services

Market Analysis and Planning Service (MAPS)



Program: Information Services Markets

Core program which provides the basic products and services which support *your* continuing information needs.

Includes:
- Hotline Client Inquiry & Support
- Monthly Newsletters
- Vertical Market Reports
- Cross-Industry Market Reports
- Joint Client Conference
- Optional Executive Presentation

. . . A *sound basis* for *your* most challenging business decisions.

Program: Software Products and Professional Services Markets

Focused program of information on those products and services which enable your customers to operate their own information systems.

Includes:
- Systems Software Products
- Applications Software Products
- Software Maintenance
- Systems Integration
- Software Design and Development
- Education and Training Services
- Facilities Management
- Consulting Services

. . . A must for *leaders* in the software industry.

MAPS — A set of subscription programs that provide you with comprehensive, accurate, timely research on your markets that can spell the difference between leading and following in this fast-changing field.

Program: Processing Services and Turnkey Systems Markets

Analyzes in detail those services in which computer services, hardware, and networks are provided as information systems solutions.

Includes:
- Value-Added Networks
- Network Services
- Computing Services
- Processing Facilities Management
- Turnkey Systems

. . . A powerful tool to *meet the challenge* of changing revenue opportunities.

Program: Microcomputer Software and Services Markets

Special market opportunities related to personal computers, workstations, and end-user computing are detailed.

Analyzes:
- Software for the Business Environment
- Successful Sales Strategies
- Vertical Industry Opportunities
- Multi-User Systems Impacts

. . . Supports *sound planning* in this fast-changing industry.

Program Services

• Hotline Inquiry Service and Support

If you have a question, our telephone Hotline consultants will turn it around fast, giving *you* the information you need to answer questions and make sound decisions.

"Essential" and "excellent" are phrases used by program clients to describe the quality of service and information received through this important service.

• Research-Based Studies

INPUT's full-time staff of experienced researchers employs a *proven* research methodology:
- Continuous client polling
- User and vendor interviews
- Review of current information in 4500 vendor files and 300 subject/industry files
- Careful analysis of data by senior analysts with years of industry experience
- Reconciliation of forecasts with actual performance.

Clients receive:
- Data
- Analysis
- Sound recommendations

• Joint Client Conference

An intense three-day conference where industry experts and key planners and decision makers from leading firms — INPUT's user and vendor clients — join together to address *critical* planning and operations issues.

Executives attending the conference's workshop sessions, industry trends presentations, and face-to-face meetings have described them as "time very well spent" and "a must for any senior manager making business direction decisions."

• Presentation By Input Senior Executive (Optional)

This confidential presentation at your site examines how industry trends, issues and forecasts affect *your* business — now and in the future. Specific recommendations for action are identified.

Top management in our client companies have overwhelmingly rated this informative session as "outstanding," "relevant and credible", "essential to market planning."

INPUT's Market Analysis and Planning Service has accurately predicted the major shifts that have occurred in the information services industry over the past ten years.

. . . *You* can benefit from its insight and coverage of the most dynamic industry in the world!

Call your nearest INPUT office today, to learn how you can join this successful service.

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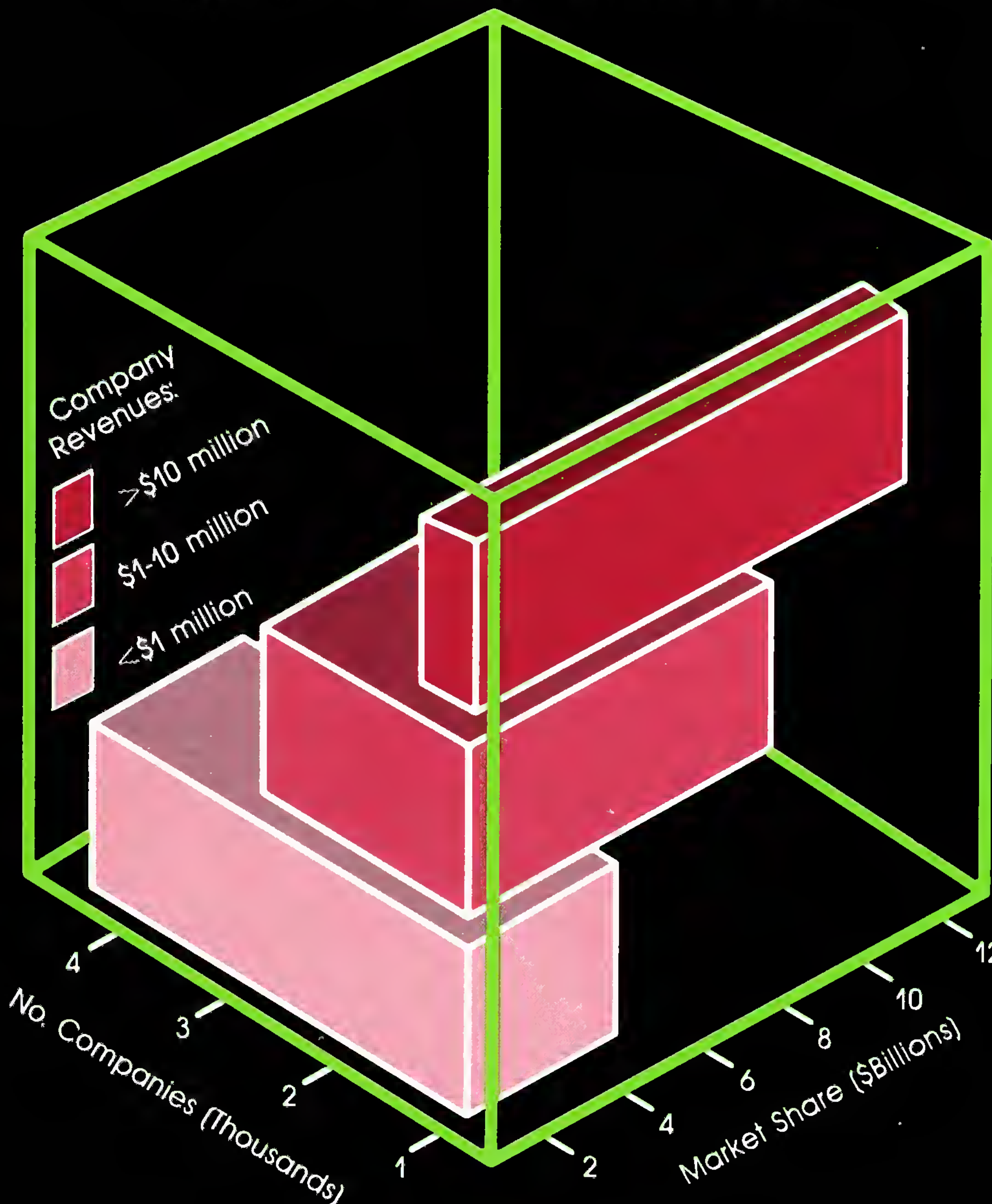
INPUT™

Information Services Market Structure



Company Analysis and Monitoring Program (CAMP)

Competitive Analysis • Acquisition Planning
Performance • Markets • Products

Company Analysis and Monitoring Program (CAMP)

Competitive analysis and acquisition targeting is tough in a field that's moving as fast as the information services industry.

To do it well, you need comprehensive, reliable, and up-to-the-minute vendor research. And you need that research to be as accessible as your telephone, or a notebook on your shelf.

INPUT's Company Analysis and Monitoring Program for the Information Services Industry (CAMP) is a subscription program that gives you exactly this kind of vendor analysis.

CAMP provides information on 4,000 vendors, including thorough and detailed examinations of over 250 industry leaders — what they sell, who they sell to, where they are, how big they are, and virtually every other question relevant to their status as competitors or acquisition targets.

What You Get

You get this information through:

- **Hotline Inquiry Service and Support** — For rapid answers to questions on information services companies from managers, field staff, and others, all you have to do is call our Hotline. The Hotline staff will get you the information fast.
- **Company Highlights** (Two Volumes, 1,200 pages) — The detailed profiles of industry leaders.
- **Directory of Information Services Vendors** (One Volume) — Annually updated information on 4,000 vendors that includes company name, address, phone number, chief executive officer, recent revenues, and services offered. The directory also includes indexes of companies by services offered, by industry markets served, and by geographic market.
- **Vendor Financial Watch** — A quarterly comparison of the revenues and net incomes — year-to-year and rolling four quarters — of 100 public companies. The publication analyzes performance by type of company.
- **Data Base Service** — You may request computer runs of selected subsets of the entire CAMP data base (e.g., all software companies with more than 50 employees serving banks and financial institutions) for the cost of processing only.
- **Vendor Library Files** — We maintain over 4,000 library files of research material on information services vendors. CAMP clients can use these files by either requesting shipment of copies or by visiting our offices.

Highlights: Exhaustive Detail

The core of the program is the set of 250 company Highlights. These in-depth profiles go into exhaustive detail of everything from income and revenue by delivery mode to product and market strategy analysis.

The Highlights distill masses of information gleaned from interviews, public documents, and statistical analysis into:

- **Market Analysis** — Who does this company sell to? What do they sell to them? How much? What percentage of their revenues is derived from various market sectors? The CAMP Highlight tells you all of this.
- **Five-Year Revenue History** — These statistics cover — for public companies — revenue, earnings per share, income before taxes, and net income for the last five years.
- **Competitive Analysis** — Who are the competitors of a given company? INPUT gives you the company's answer, and our answer, along with reports of recent contract activity.
- **Product and Service Analysis** — CAMP examines in detail what kinds of products and services a given company sells, and how they are faring in the marketplace.
- **Organizational Analysis** — How many employees a company has, how many divisions, what the divisions do, and more, are all covered in CAMP.

In addition, the program tells what kind of computer hardware and software the company uses to provide its products and services, how many and where are its field offices, what geographic markets it covers, and so on.

In 1984, the CAMP staff will concentrate on applying this kind of meticulous analysis to companies that produce microcomputer software.

A Staff At Your Disposal

No other program available today can give you this kind of large-scale, detailed analysis of information services companies.

The CAMP Directory and Highlights are, almost literally, a highly trained research staff at your personal disposal. And if you ever have questions these publications do *not* answer, then our highly trained CAMP Hotline staff members are only a phone call away. They keep the phone lines open 10 hours a day to keep you up to date.

Meet The Challenge

Competitive analysis and acquisition targeting are tough problems indeed — unless you have the right business tools to solve them.

INPUT's CAMP is especially designed to give you those tools now — at a tiny fraction of the costs you would incur to develop them in-house.

Use our Company Analysis and Monitoring Program to meet *your* strategic planning challenges. See the enclosed authorization form, or give us a call today.

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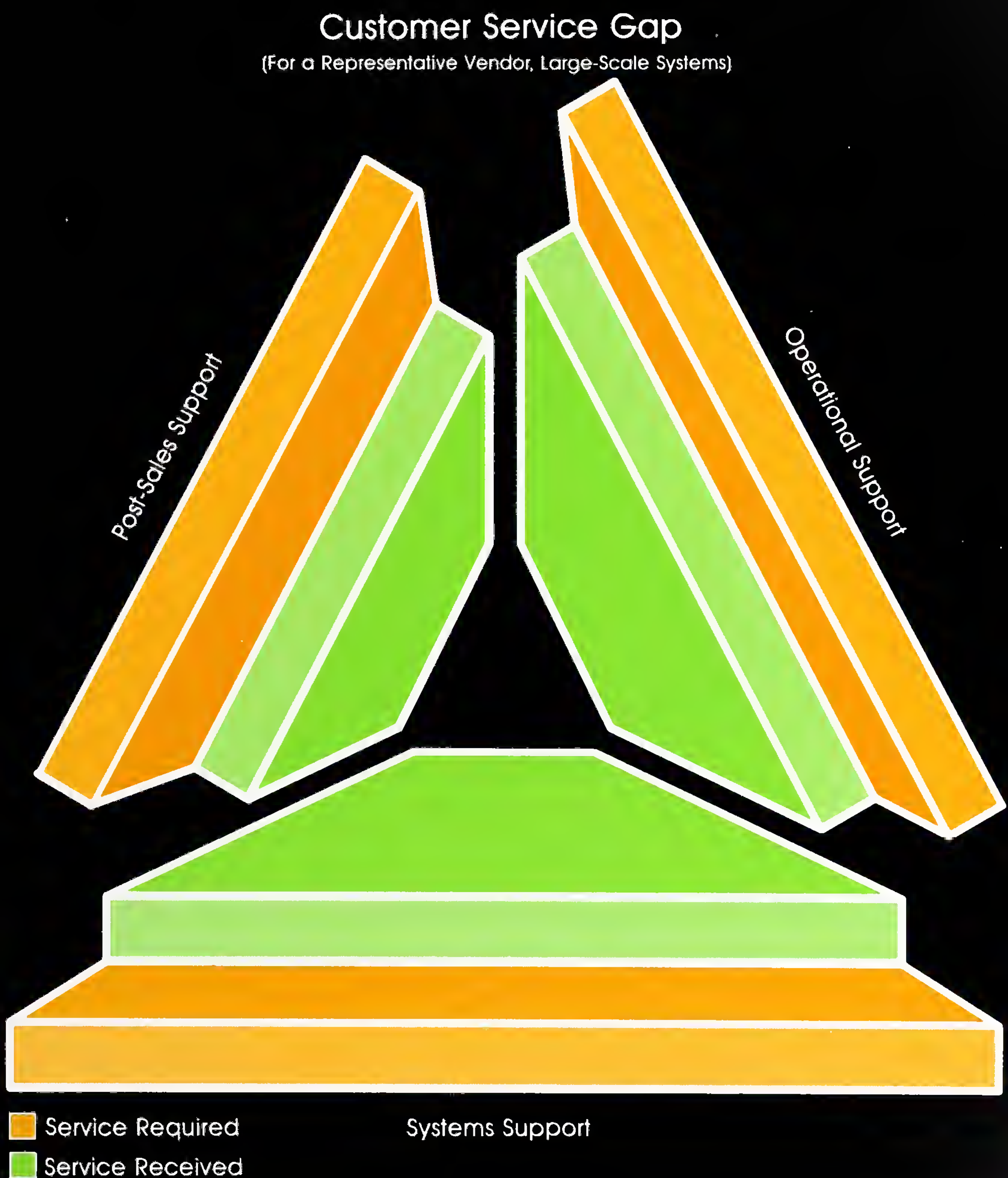


Customer Service Program (CSP)

Large Information Systems • Small Information Systems
Office Automation/End-User Systems

Dramatically different personnel skills, business and financial talents, and marketing awareness — that's what you'll need to make the transition from the old hardware-maintenance/cost-center days of field service to the new "Total Support" customer service environment.

INPUT's Customer Service Program (CSP) is a subscription program that gives you the top-flight market research you need to make that transition smoothly and profitably.

The program is based on over 1,300 user telephone interviews, detailed interviews with 50 customer service organizations, plus a continuously updated library of information on over 4,000 information technology companies.

You receive data analysis reports, Hotline inquiry service and support, user survey data, and library access, all of which focus on the questions you must have answered to guide your customer service organization through the changes ahead:

- What do your users really require, and how can you meet their needs most efficiently?
- What is the competition doing, and how can you respond?
- Where are the sources of revenue growth for the next five years?
- How will the concurrent increase in hardware reliability and software complexity affect your personnel mix?
- What are the new service techniques, and how are they being received in the marketplace?

INPUT's CSP helps you answer these and a host of other questions that can spell the difference between profit and loss, market growth or stagnation, and customer satisfaction or unhappiness.

Structure

The 1984 Customer Service Program is structured in such a way that you can tailor it specifically to your organization's needs. It includes Client Support plus three market sector programs.

Client Support

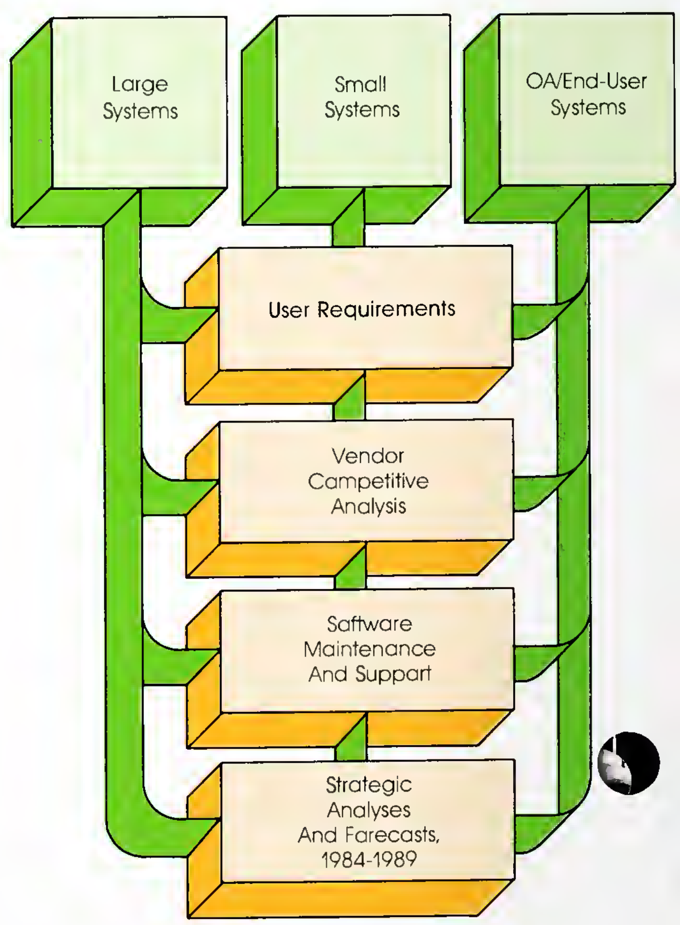
CSP's Client Support offers you:

- **Hotline Inquiry Service and Support** — If you have a question related to customer service, the Hotline staff will turn it around fast.
- **Client Presentation** — A presentation by INPUT top management highlighting the results of the year's research, and analyzing the major trends in customer service. These are confidential, in-house meetings focused on your needs.
- **User Survey Data** — INPUT provides the raw data of the user surveys that you subscribe to on floppy disks and printouts for your own analysis. You can specify a group of users for additional research as an incremental service.
- **Library Access** — INPUT keeps library files on 4,000 information technology vendors. Those files are open to you when you subscribe to CSP.
- **Access to Senior Staff** — Our senior analysts are a reservoir of information and decision support. Many of them have over 20 years of experience analyzing the service environment.

All CSP subscribers receive Client Support. The rest of your subscription is rounded out by a choice of reports from the 12 reports produced in the three market sector programs.

12 Reports

For each customer service market program — large systems, small systems, and office automation/end-user systems — INPUT will publish four reports: one each on user service



requirements, vendor competitive analysis, software maintenance and support, and strategic analyses and forecasts through 1989.

User Service Requirements

The user service requirements reports are produced at the end of the first quarter. They analyze — by vendor — the differences between what users require and what they actually get in 14 categories of after-sales support. The areas include: environmental planning; physical site planning; consulting; documentation; training; installation planning; hardware maintenance; software maintenance; supplies sales; add-on sales; site audits; relocation; and deinstallation.

Numerical ratings of various vendors' performances, of user satisfaction, and of user resistance to price increases are all included.

The reports highlight ways service organizations can more efficiently allocate existing resources to alleviate problems.

Vendor Competitive Analysis

These three reports are published during the second quarter. They provide detailed analyses of major competitive trends in customer service, including third-party maintenance, the use of remote diagnostics, the increasing reliability of hardware, etc.

The reports also examine trends in customer service operations and management, the role of marketing, software service pricing, and profitability issues for the key vendors in each market.

Software Maintenance And Support

These reports will investigate the biggest revenue growth opportunity in this decade for customer service, and will examine the effects of integrating software and hardware customer service in one organization. The reports also analyze software support pricing policies, marketing and sales issues, and new service delivery methods.

Vendor profiles are provided to show by example 1) practical options that have been implemented and 2) the advantages and disadvantages of each. Software service revenue forecasts for each year through 1989 round out each report.

Strategic Analyses and Forecasts, 1984-1989

These reports, published in the fourth quarter, are comprehensive analyses of overall customer service revenues now and for the next five years.

The reports also study changes in the various service strategies and highlight emerging opportunities for customer service growth. They can serve as invaluable early warning systems for customer service management on the trends that will affect them.

You Choose

Of the preceding 12 reports, you can choose any four to fill your basic CSP subscription. For example, if you are in large systems customer service, you could choose all four large systems reports. But if you were interested in the changes in software support, then you could take the three Software Maintenance and Support reports plus one report from another subject area.

Of course, extra reports are available for an additional fee.

Comprehensive

INPUT's Customer Service Program is the most comprehensive treatment available today of the issues that will affect your business success tomorrow. Flattening productivity curves, corporate pressure for greater profits, rapidly changing user requirements — only INPUT can give you the focused market reseach you need to meet these challenges.

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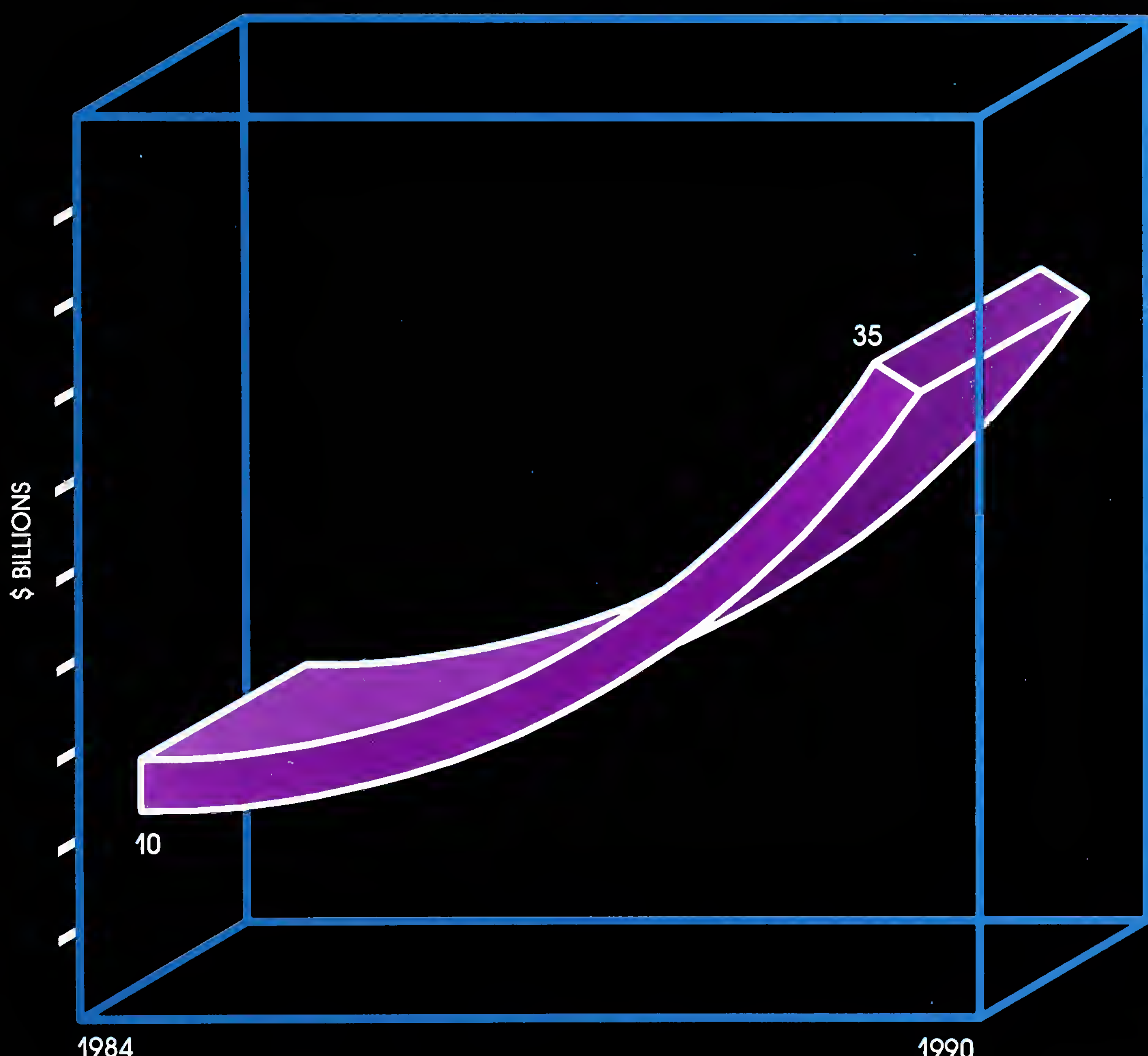
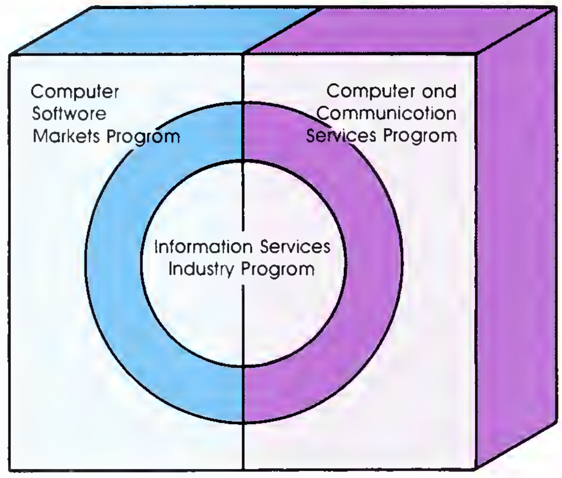
Western European Information Services Market



Software and Services Planning Service—Western Europe (SSPS)

Computer Software Markets
Computer and Communications Services Markets

Software and Services Planning Service — Western Europe (SSPS



Software and Services Planning Service

A set of subscription programs that provide timely and accurate intelligence on some of the fastest moving markets in the world.

The programs are a powerful tool for tracking and anticipating trends within these volatile markets — trends that could spell the difference between profit and loss for *your* firm depending on how much *you* know about them, and when *you* find out.

SSPS gives *you* a comprehensive analyses of the following:

- Market sizes through 1990
- Environmental and competitive factors influencing the demand for information services in Western Europe.
- Impacts of information technology developments such as personal computers and network processors on information services markets.
- Successful marketing strategies.
- Opportunities in vertical and cross-industry markets.

. . . and more.

Program:
Information Services Industry

This core program provides the basic reports and services *you* need for effective planning — making it one of the most sought after sources of information on *your* markets in the world today.

- **European Information Services Industry Analysis and Forecast — through 1990**
  Analyzes:
  - Market Sizes and Growth Rates
  - User Attitudes
  - Successful Vendor Strategies
  - Competitive Pressures

  and more.
- **Hotline Inquiry and Support Service**
  If you have a question, our telephone Hotline consultants will turn it around fast, giving *you* the information *you* need to answer questions and make sound decisions.
- **Joint Client Conference**
  Held in London during the fourth quarter of the year, enables *you* to discuss with senior INPUT staff and other clients key planning and operations issues, face-to-face.
- **Executive Bulletins**
  Quarterly bulletins to keep you abreast of rapidly developing international market trends.
- **Semi-Annual Client Meetings**
  Senior INPUT staff meet with your executives to discuss key software and services markets issues chosen by the client.

- **Access to INPUT Senior Staff**
Direct access to our staff, many of whom have more than 20 years of experience analyzing these volatile markets, for continuing research support. When you buy INPUT, you buy experience.

Program:
Computer Software Markets

The Computer Software Markets Program examines two distinct market segments — end users and corporate information systems departments — for vendors who provide custom or packaged software.

You receive:
Detailed Market Analysis Reports
which address:
- Applications Software Development
- Software Product Pricing Trends
- Impacts of IBM Software Strategies
- Integrated DBMS-Applications Software Strategies
- New Trends in Fourth Generation Languages.

Program:
Computer and Communications Services

The Computer and Communications Services Program analyzes in detail the rapid changes that are having such dramatic effects on these markets. The program's reports and services emphasize market opportunies created by revolutions in telecommunications and personal computers.

You receive:
Detailed Market Analysis Reports
which address:
- Value-Added Networks
- European Videotex Market Opportunities
- Micro-Mainframe PC Update
- Systems Integration
- Systems vs. Services for Small Organizations.

SSPS: Meets Your Planning Needs

INPUT's new Software and Services Planning Service (SSPS): Comprehensive, accurate, and timely research on the market issues that can spell the difference between leading and following in this fast changing field.

Don't be a follower. Turn market changes into market growth for *your* business with INPUT's Software and Services Planning Service.

We've designed this service to meet *your* planning needs now and throughout the coming year. Take a moment now to give us a call, or complete the enclosed service authorization form.

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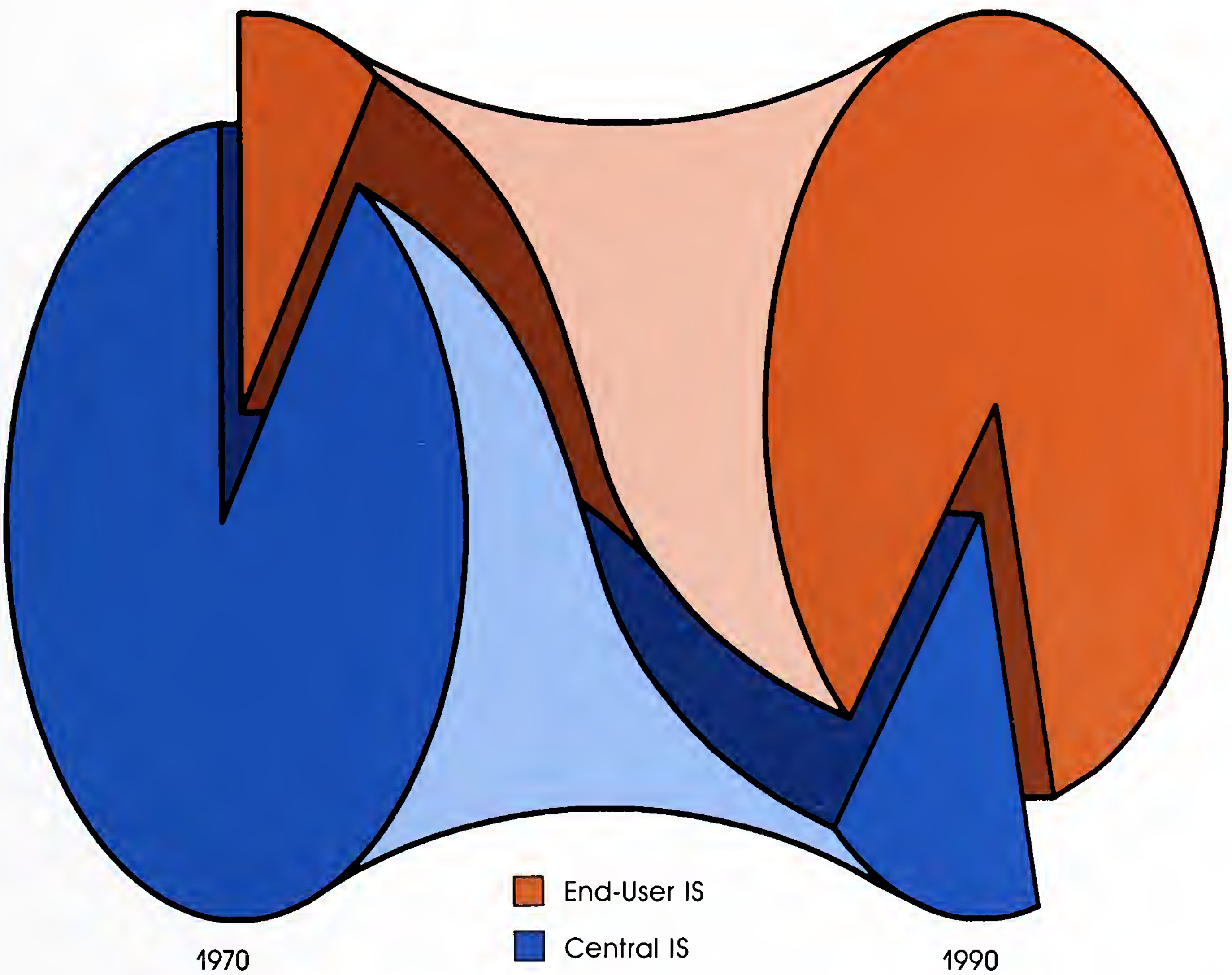
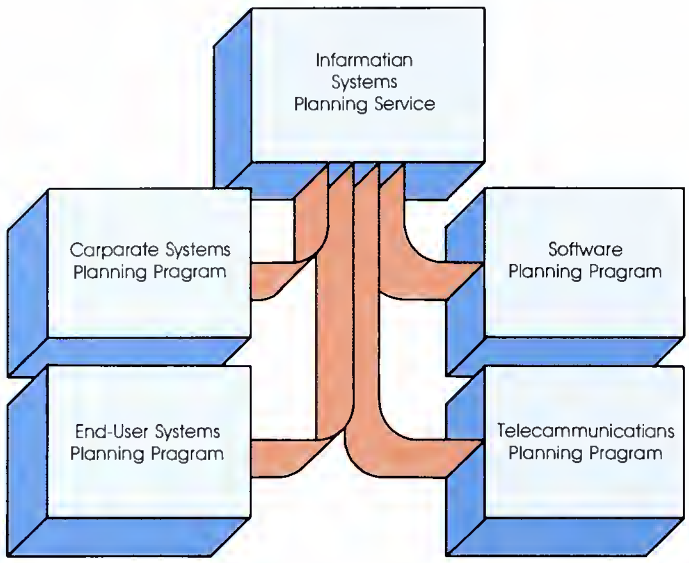
Distribution of Information Systems (IS) Resources



Information Systems Planning Service (ISPS)

Telecommunications • Software
End-User Systems • Corporate Systems

Information Systems Planning Service (ISPS)



ISPS: Enhancing Your Effectiveness

The Information Systems Planning Service (ISPS) gives *you* research-based analysis of the technology and management trends that influence information systems' (IS) effectiveness — and at a fraction of the cost you would incur to do the research yourself.

ISPS has been designed by clients to meet the needs of successful IS organizations. Put this service to work for *you* today. See the enclosed authorization form, or give us a call now.

ISPS — A set of research and planning programs that untangle the complex factors in computer, communications, software, office, and organization decisions.

Client Support

ISPS client support services address *your* day-to-day concerns; giving *you* the answers you need — when *you* need them:

- **Hotline Inquiry Service and Support,** telephone Hotline consultants turn your questions around fast — giving *you* the information you need to make sound decisions.
- **Access to Senior Research Staff,** many of whom have 20 years of experience in information systems (IS).
- **Joint Client Conference,** where you get down to brass tacks with other users, vendors and industry experts about the information systems and services issues that concern *you.*
- **Client Presentation (Optional),** a confidential briefing at your site by INPUT's top management, emphasizing:
  - — IS organization trends
  - — Role of IS
  - — Humatics — computers and people
  - — Impact of vendor strategies
  - — Opportunities for IS departments
  - — Software and systems trends
  - — Telecommunications and office requirements
  - — Important new technologies
  - — Dealing with the end-user revolution
  - — Strategies for micro-mainframe/ distributed data processing
  - — Protecting corporate assets of data and software

..ogram: Telecommunications Planning

The telecommunications industry is in the midst of turbulent change; demand for telecommunications products and services is expanding and changing rapidly.

INPUT's Telecommunications Planning Program concentrates on the implications of this upheaval for IS managers; particularly voice/data network interactions, and the movement of IS into office communications. The program includes:

- **Research Reports** on telecommunications which address:
  - —Micro-mainframe connections
  - —Telecommunications security
  - —Economics of telecommunications
  - —LAN/CBX issues
  - —Telecommunications interfaces
  - —Network management systems
  - —Voice/Data communications
  - —Strategic and tactical telecommunications planning methodologies

Program: Software Planning

Software development and installation is a major problem for IS departments, with development backlogs often measured in years. INPUT addresses this problem with:

- **Research Reports** on software planning which examine:
  - —Productivity improvements
  - —Micro-mainframe software
  - —Simulation/prototyping
  - —Software protection
  - —Artificial intelligence
  - —End-user software
  - —Life cycles of critical applications
  - —Fourth generation languages

Program: End-User Systems Planning

By 1990, eighty percent of all computing will be by and for end users. This program provides IS managers with concrete methods of implementing an effective end-user strategy.

- **Research Reports** on critical planning issues, covering:
  - —Micro-mainframe experiences
  - —Office systems integration
  - —Training and support of end users
  - —Multi-user systems
  - —Microcomputers in the information center
  - —Office videotex
  - —Intelligent workstations
  - —Successful approaches to improve end-user relations.

Program: Corporate Systems Planning

Never has the role of the corporate information systems department been more critical; it is the foundation of all successful IS activities.

The Corporate Systems Planning Program equips *you* to meet this demand with:

- **Information Systems Strategy Reports,** address corporate IS planning and organizational impacts of the:
  - —Explosion of end-user computing
  - —New IS planning and organizational requirements
  - —Rapid changes in computer hardware and operating systems
  - —Micro-mainframe trend
  - —Changing EDP budgets and plans (for up to 11 industry sectors)
- **Computer Systems Directions Reports,** covering mainframes, storage systems and other devices:
  - —Forecast residual values
  - —Predict vendor actions (particularly IBM)
  - —Analyze IBM-compatible vendor viability.

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1985 MATERIAL

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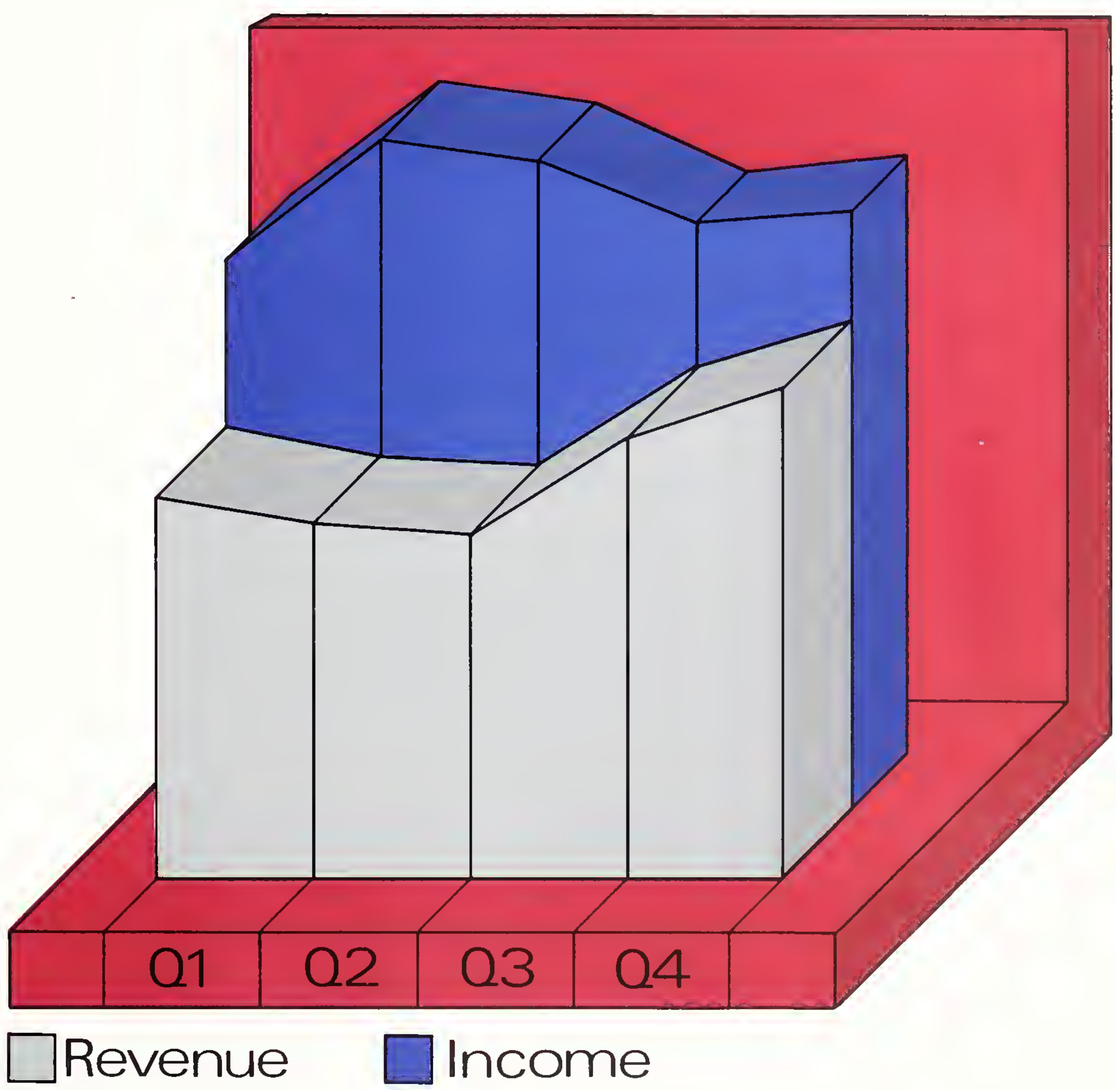
INFORMATION SERVICES

VENDOR FINANCIAL WATCH



October 1985

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INFORMATION SERVICES VENDOR FINANCIAL WATCH

October 1985

I INTRODUCTION

- The Vendor Financial Watch (VFW) is a quarterly INPUT analysis of up-to-date financial reports of public information processing services, professional services, software products, and turnkey systems companies, both for comparative purposes (vendor to vendor) and to enable participants in a given sector of the information services market to monitor the overall growth of their sector.

- Each sector of the information services market is analyzed separately, both from a revenue and from a net income standpoint. The growth trends are analyzed in the last three columns of each data sheet in increasing calendar sequence; this is intended to provide an indication of the very latest developments in revenue and net income growth.

- Each information services market sector is also commented on separately, highlighting individual company successes and failures, and the trend in the market sector as a whole. The summary analysis at the back of the VFW report analyzes the comparative trends between sectors and comments on the trend of the total Information Services market. This section is particularly important since it identifies growth patterns very clearly.

- This quarterly Vendor Financial Watch report is intended as a planning tool for market planning executives and as an information newsletter for company executives. The data contained are extracted from published sources, annual reports, and 10-K reports, supplemented by INPUT's estimates (denoted by a * following a value) where data was not yet available from the company.

- This issue covers 101 information services vendors.

II DATA REPORTED

- The VFW report is divided into two sections:

    - Information services delivery mode analysis.

    - Total information services industry financial performance.

- Financial data provided includes each vendor's revenue and net income, reported on a calendar quarterly basis and comparisons on performance provided for:

    - 1984 versus 1983 (year on year).

    - Last calendar nine months' results compared to the year earlier period.

    - Last calendar six months' results compared to the year earlier period.

- Fiscal quarterly revenue is approximated to calendar quarterly revenue as follows:

    - Quarterly revenue reported as of February, March, and April is reported as Q1.

    - Quarterly revenue reported as of May, June, and July is reported as Q2.

    - Quarterly revenue reported as of August, September, and October is reported as Q3.

    - Quarterly revenue reported as of November, December, and January is reported as Q4.

- Fiscal year-end dates are provided in column 2 so that actual quarters for each company can be identified. Values that are followed by an asterisk (*) are INPUT estimates, pending release of the final results from the vendor. These are included so that the overall totals for each sector may be as complete as possible.

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PUBLIC PROCESSING SERVICES VENDORS

III PROCESSING SERVICES TREND ANALYSIS

- Growth of the processing services sector shows a decline in the latest quarterly analysis:
  - 1984 revenue grew 22% over 1983 (for the 32 company sample).
  - Rolling nine months' revenue comparison shows a 16% growth.
  - The last six months' revenue in 1985 grew 15% over the year earlier period.
- Net income is still growing but barely above inflation:
  - Up 7% in 1984 over 1983.
  - Up 8% in the last nine months over the year earlier period.
  - Up 11% in the last six months over the year earlier period.
- These results are impacted by continued poor income performance from Epsilon, Fidata, Network D. P., and Telecredit. In addition, losses continued at Keydata and Computer Research. Anacomp had the largest single year loss ever recorded in the processing services industry in 1984--over $82 million but is slowly recovering.
- The best performers are well focused, specialized service companies. Paychex, ADP, Shared Medical, Systematics, and Telerate have retained excellent net income on a steady revenue growth curve.
- Total sample: 32 companies representing 20% of the processing services industry revenues. Note that Anacomp's results have been removed to avoid distortion of the entire sample. Information Resources has been added for the first time this issue and Bradford National now appears under its new name--Fidata.

update: 10/1/85

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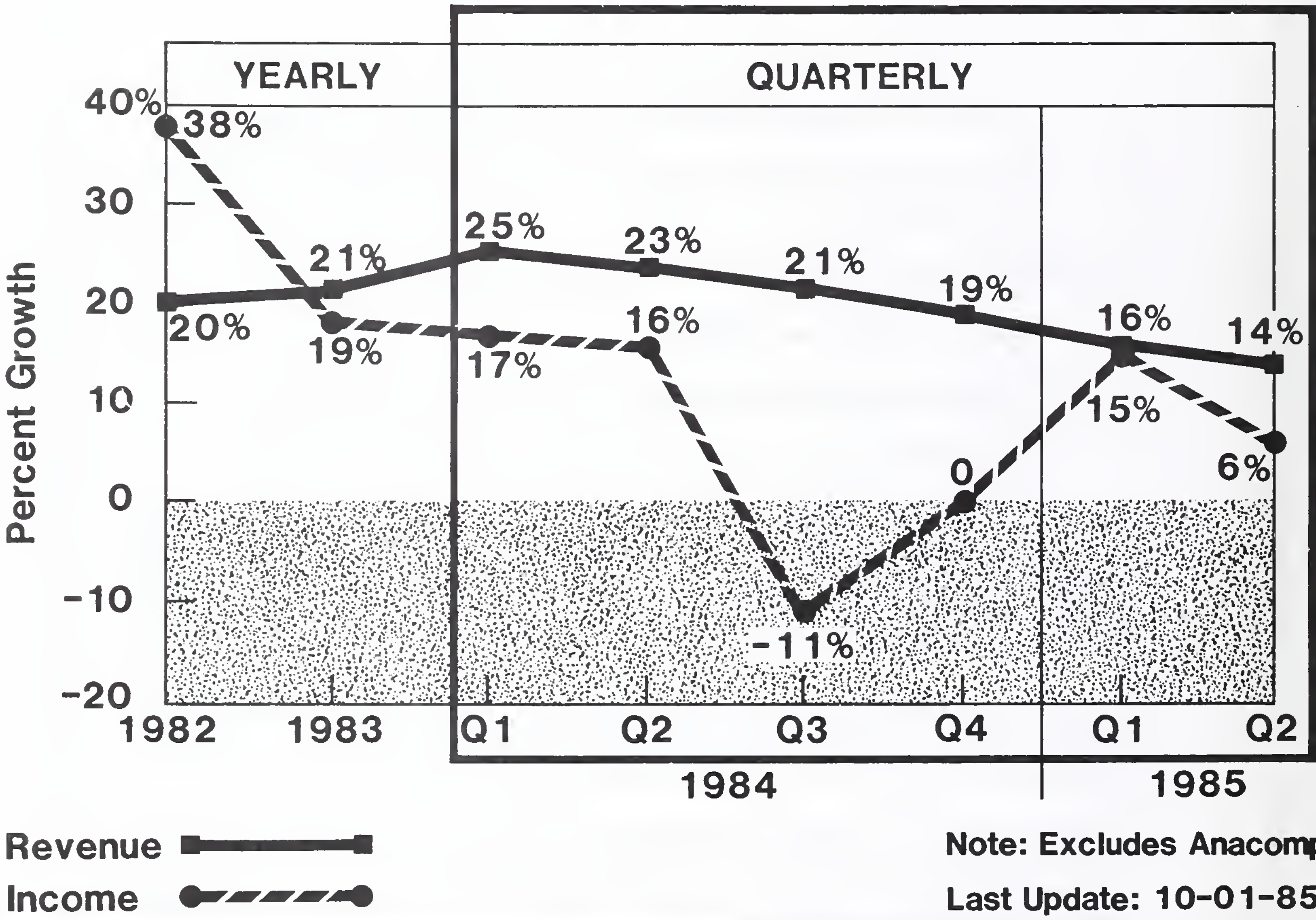
PUBLIC PROCESSING SERVICES VENDORS



Note: Excludes Anacomp

Last Update: 10-01-85

REVENUES OF PUBLIC PROCESSING SERVICES COMPANIES

		REVENUE ($ Thousands)										GROWTH (Percent)		
		1983			1984					1985		1984/	LAST 3	LAST 2
COMPANY NAME	FISCAL YEAR END	Q3	Q4	TOTAL	Q1	Q2	Q3	Q4	TOTAL	Q1	Q2	1983 %(+/-)	ROLLING QUARTERS	ROLLING QUARTRS
ADP	06-30	202323	218481	813722	234915	233195	236557	253620	958287	273528	266310	18	16	15
CITZN FIN	12-31	2378	2267	9632	2620	2504	7582	2423	15129	2683	2551	57	4	2
COMDATA NTWK	12-31	18198	18739	63369	19755	19939	20547	20945	81186	22400	20500	28	9	8
COMPUSERVE	04-30	12579	13172	47943	14692	15447	16422	17684	64245	19308	20010	34	32	30
COMPUTER LAN	12-31	14208	15943	85215	35301	26303	17280	19300	98184	36587	24770	15	4	0
COMPUTER NET	03-31	4306	3474	15699	2684	1787	4345	7848	16664	8800	8726	6	219	292
COMPUTER RES	08-31	1729	1498	6136	2033	1946	1914	2006	7899	2028	1789	29	6	-4
COMPUTER SER	02-28	2500	2600	9836	2525	2400	2420	2514	9859	2604	2717	0	4	8
COMPUTONE	05-31	6265	8443	28062	8728	10030	9204	12743	40705	21089	12000	45	68	76
COMSHARE	06-30	18340	17869	73873	18016	18783	16725	15473	68997	14846	16010	-7	-15	-16
COOK DATA SV	12-31	1324	1081	5625	1356	1066	1598	1200	5220	1351	1045	-7	3	-1
CYCARE	12-31	7636	8309	29246	7987	9402	10931	11754	40074	9938	11611	37	30	24
DST SYSTEMS	12-31	12883	12509	47830	13405	14709	14856	15157	58127	17430	18941	22	27	29
DYATRON	12-31	8248	11341	33858	8503	8305	8248	14460	39516	9592	9574	17	19	14
EPSILON	05-31	7701	9766	32718	10065	12779	11265	10210	44319	12072	14020	35	11	14
FIDATA	12-31	36207	36735	144406	36990	39207	38086	38000	152283	33007	31557	5	-9	-15
GENESEE	05-31	220	223	1050	225	275	317	347	1164	351	402	11	52	51
INFO.RESOURC.	12-31	544	6622	16193	13891	14332	15568	17298	61089	17458	18332	277	52	27
KEYDATA	07-31	1340	1317	5289	1423	1416	1163	1158	5160	1107	1050	-2	-20	-24
NAT DATA	05-31	33377	34349	128151	37146	34061	33752	34867	139826	36576	36103	9	2	2
NETWK D.P.	03-31	813	611	2643	628	833	659	657	2777	650	763	5	0	-3
NUMERAX	06-30	1848	1989	7028	2094	2184	2304	2404	8986	2499	2663	28	21	21
PAYCHEX	05-31	7533	7454	27765	8049	8683	9577	9917	36226	10936	10936	30	31	31
PAY-FONE	06-30	1248	1427	5024	1305	1425	1698	1980	6408	1713	1614	28	28	22
QUOTRON	12-31	40277	42213	153810	44493	46631	47921	50754	189799	48813	50449	23	13	9
SCIENTIF.COM	06-30	3374	3578	13490	3857	4059	3358	3718	14992	3696	3669	11	-4	-7
SEI CORP	12-31	17703	20889	69239	23037	23043	23968	23655	93703	25029	26894	35	13	13
SHARED MEDIC	12-31	54079	56991	210814	59763	62818	65726	68446	256753	72708	76876	22	21	22
SYSTEMATICS	05-31	19008	18587	71382	20455	20662	21896	22642	85655	24443	26894	20	24	25
TELECREDIT	04-30	15839	20500	68281	18924	20244	19602	23813	82583	21639	22743	21	14	13
TELERATE	09-30	19991	25611	79145	27460	29323	31574	34209	122566	36926	40661	55	36	37
TSR INC	05-31	3555	4042	14092	4512	4449	4485	4481	17927	4420	4893	27	6	4
TOTALS		577574	628630	2320566	686837	692240	701548	745683	2826308	796227	787073	22	16	15

32 COMPANIES

LAST UPDATED: 10-01-85

NET INCOME OF PUBLIC PROCESSING SERVICES COMPANIES

COMPANY NAME	FISCAL YEAR END	NET AFTER TAX INCOME ($ Thousands) 1983 Q3	1983 Q4	1983 TOTAL	1984 Q1	1984 Q2	1984 Q3	1984 Q4	1984 TOTAL	1985 Q1	1985 Q2	GROWTH (Percent) 1984/1983 %(+/-)	LAST 3 ROLLING QUARTERS	LAST 2 ROLLING QUARTRS
ADP	06-30	13650	17550	68705	22100	21830	15395	20137	79462	26140	26178	16	18	19
CITZN FIN	12-31	516	540	2361	393	282	1004	254	1933	400	307	-18	-21	5
COMDATA NTWK	12-31	2988	2899	11083	3075	3637	3881	2674	13267	3400	3500	20	0	3
COMPUTER LAN	12-31	-1104	-1431	8630	7145	2762	-1585	-1751	6571	7164	1784	-24	-15	-10
COMPUTER NET	03-31	-848	68	-551	33	-538	-541	107	-939	513	56	-70	255	213
COMPUTER RES	08-31	96	98	554	114	128	0	21	263	80	-33	-53	-80	-81
COMPUTER SER	02-28	230	425	1158	300	240	205	350	1095	185	220	-5	-22	-25
COMPUTONE	05-31	74	30	1144	-818	305	208	266	-39	423	450	-103	336	270
COMSHARE	06-30	247	253	2335	415	475	-215	-5479	-4804	577	350	-306	-498	4
COOK DATA SV	12-31	177	92	139	92	-88	247	50	301	40	103	117	101	3475
CYCARE	12-31	581	698	1899	473	555	731	841	2600	281	309	37	-17	-43
DST SYSTEMS	12-31	2616	1677	9057	2348	2846	2694	1977	9865	2529	2352	9	0	-6
DYATRON	12-31	-182	-4499	-4607	34	-267	-71	806	502	355	301	111	131	382
EPSILON	05-31	123	632	1331	257	576	-140	176	869	-231	396	-35	-77	-80
FIDATA	12-31	-4389	-3805	-8089	733	1561	-12924	-5000	-15630	1025	-343	-93	-186	-70
GENESEE	05-31	220	223	1050	225	275	317	347	1164	351	402	11	52	51
INFO.RESOURC.	12-31	896	1329	3702	1293	1161	1721	1736	5911	3189	2087	60	85	115
KEYDATA	07-31	2	1	-896	-4	35	-10	-215	-194	18	10	78	-684	-10
NAT DATA	05-31	2791	2832	11320	3191	3280	1106	1876	9453	2220	2340	-16	-31	-30
NETWK D.P.	03-31	219	-76	266	-14	212	-70	-79	49	-49	72	-82	-146	-88
NUMERAX	06-30	92	141	365	103	86	124	175	488	173	184	34	61	89
PAYCHEX	05-31	609	621	1895	378	413	684	785	2260	608	905	19	63	91
PAY-FONE	06-30	-170	-48	-66	-151	-237	83	105	-200	-67	87	-203	129	105
QUOTRON	12-31	6265	6735	23981	6917	6867	6425	6614	26823	5822	5700	12	-12	-16
SCIENTIF.COM	06-30	297	285	1159	317	331	181	10	839	184	192	-28	-59	-42
SEI CORP	12-31	1350	1395	5244	927	936	622	-1928	557	885	955	-89	-103	-1
SHARED MEDIC	12-31	7165	7448	27254	7535	8195	7729	9333	32792	9359	10050	20	24	23
SYSTEMATICS	05-31	1607	1389	5518	1395	1658	1526	2257	6836	2230	2632	24	60	59
TELECREDIT	04-30	886	1669	4543	1104	1473	925	918	4420	65	870	-3	-56	-64
TELERATE	09-30	6145	6464	22818	6900	7536	7751	8180	30367	8657	8227	33	20	17
TSR INC	05-31	207	251	864	254	316	512	529	1611	590	388	86	84	72
TOTALS		43356	45886	204166	67064	66841	38515	46072	218492	77116	71031	7	8	11

DS

30 COMPANIES

LAST UPDATED: 10-01-85

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PUBLIC PROFESSIONAL SERVICES VENDORS

IV PROFESSIONAL SERVICES TRENDS ANALYSIS

- The growth of revenues in the professional services sector suddenly improved this quarter:

  - 1984 revenues grew 14% over 1983 (compared to 16% in 1983 over 1982.

  - The last nine months' revenue comparison shows a 16% growth.

  - The last six months' revenue results for 1984 shows a 17% increase over the previous six months.

- In the quarter, growth was up 19% over last year.

- Net income growth shows a weakening pattern however:

  - 23% up in 1984 over 1983.

  - 21% up in the rolling three quarters analysis.

  - A smaller 12% up in the latest six months.

  - A growth of 7% in the last quarter.

- A number of small- and medium-sized vendors continue to show excellent growth patterns:

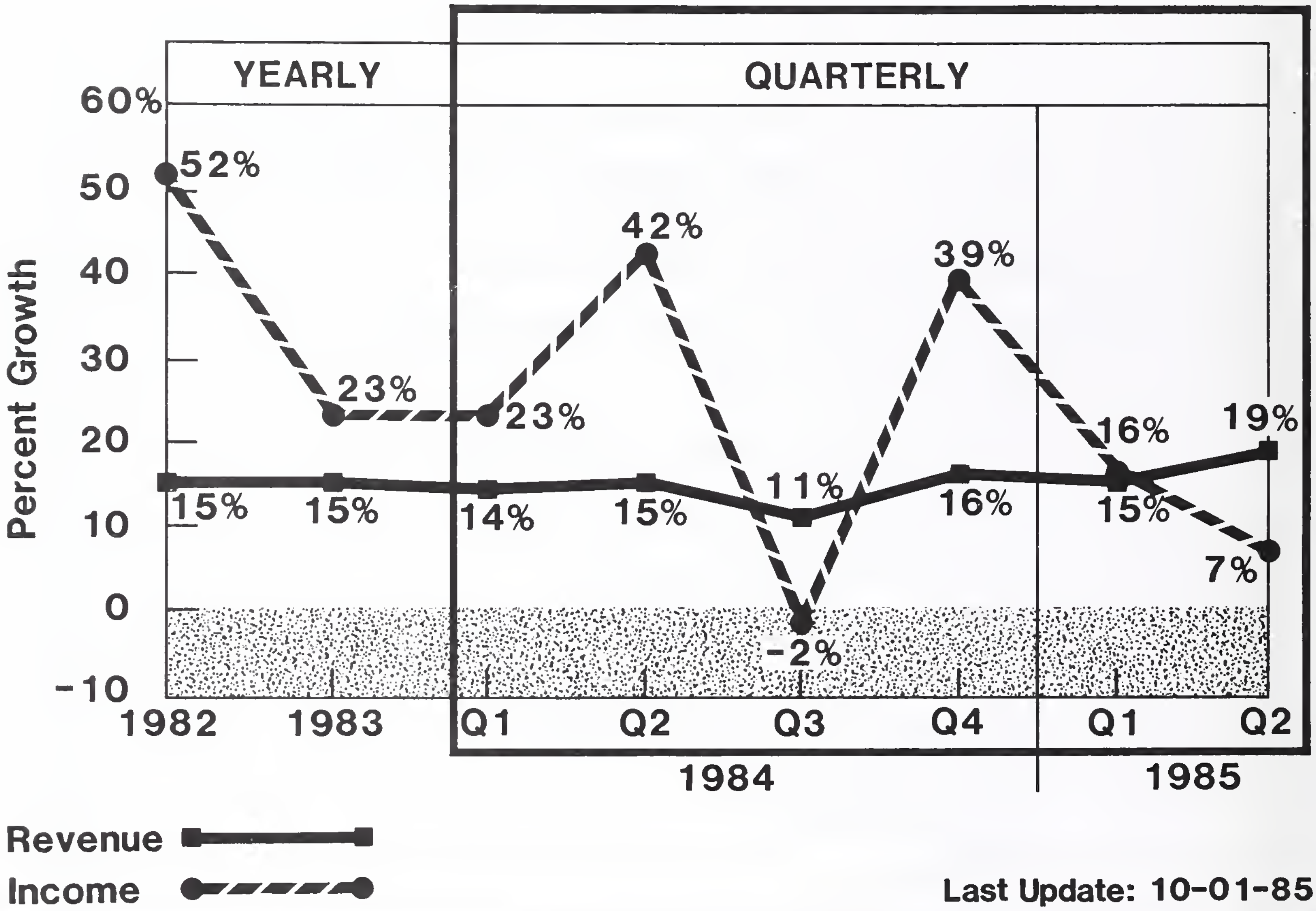
  - AGS Computer (a multiservice vendor).
  - Computer Data.
  - Computer Task Group.
  - Dynamics Research.
  - Logicon.
  - Technalysis.

- While many such vendors show very strong revenue growth, a small number show either a decline (202 Data Systems, CACI, Systems & Computer Technology) or stagnation (CSC, Planning Research Corporation, Rand Information Services).

- The total sample this quarter is 24 companies or 33% of the professional services industry's total revenue.

update: 10/1/85

PUBLIC PROFESSIONAL SERVICES VENDORS



Last Update: 10-01-85

REVENUES OF PUBLIC PROFESSIONAL SERVICES COMPANIES

COMPANY NAME	FISCAL YEAR END	REVENUE ($ Thousands) 1983 Q3	1983 Q4	1983 TOTAL	1984 Q1	1984 Q2	1984 Q3	1984 Q4	1984 TOTAL	1985 Q1	1985 Q2	GROWTH (Percent) 1984/ 1983 %(+/-)	LAST 3 ROLLING QUARTRS	LAST 2 ROLLING QUARTRS
202 DATA SYS	10-31	442	1669	3648	627	491	553	503	2174	489	562	-40	-44	-6
ACT	12-31	3121	2659	11185	2679	3235	2741	3227	11882	3036	3526	6	14	11
ADV.SYSTEMS	10-31	11929	10003	39942	9274	9486	11967	10557	41284	11529	11254	3	16	21
AGS COMPUTER	12-31	38775	46584	145911	53029	52944	56147	61960	224080	65742	70327	54	30	28
AM. MGT. SYS	12-31	21023	20747	79196	20998	23023	25374	27611	97006	26647	27260	22	26	22
ANLYSTS INT.	06-30	6477	7304	25600	8152	8754	9420	10368	36694	11954	12549	43	44	45
AUXTON COMP	12-31	5126	5659	19515	5873	5635	6251	6146	23905	6453	7182	22	15	18
BDM INTERN'L	12-31	40657	41681	151145	41607	45730	48838	55225	191400	50764	62021	27	30	29
BBN	06-30	23710	25150	94470	27459	30031	29437	31875	118802	35294	41614	26	32	34
C.A.C.I.	06-30	26791	30249	115344	26070	26736	24383	24622	101811	24961	23990	-12	-11	-7
COMP DATA	06-30	12780	13039	48200	14086	14966	15028	14080	58160	12666	13097	21	-5	-11
COMP HORIZ	02-28	8100	9140	30679	10164	10435	10588	11636	42823	11973	12507	40	21	19
CSC	04-01	184395	168525	718880	185028	173895	172027	178684	709634	198887	187565	-1	7	8
COMP TASK GR	12-31	13551	16136	53885	17377	18629	21876	24741	82623	26035	28166	53	51	51
DATA ARCHTS	11-30	7914	5420	23545	3527	4586	4398	3026	15537	4264	5347	-34	-7	18
DYNAMICS RES	12-25	9701	15442	43663	11241	11944	12125	17760	53070	14633	14242	22	21	25
INTERMETRICS	02-28	7765	9063	32821	10216	10537	11016	10869	42638	10587	11324	30	10	6
KEANE	12-31	5192	6871	21659	7317	8430	8915	9166	33828	9951	10341	56	30	29
LOGICON	03-31	30631	32692	120674	36691	39380	45541	39646	161258	43689	44100	34	17	15
PRC	06-30	79856	76467	318906	79480	84919	78177	81770	324346	93931	118485	2	22	29
RAND INFO.	02-28	2994	3735	12392	2842	2546	2753	2920	11061	2924	2611	-11	-7	3
SYSCON CORP	11-30	21871	26101	87015	24006	27253	26084	26687	104030	26174	28462	20	5	7
SYST.& COMP.	09-30	12415	12688	46901	13560	15017	16500	17000	62077	12512	11874	32	0	-15
TECHNALYSIS	12-31	1651	2007	7941	2417	2317	2276	2938	9948	3128	3142	25	37	32
TOTALS		576867	589031	2253117	613720	630919	642415	673017	2560071	708223	751548	14	16	17

24 COMPANIES

LAST UPDATED: 10-01-85

NET INCOME OF PUBLIC PROFESSIONAL SERVICES COMPANIES

COMPANY NAME	FISCAL YEAR END	NET AFTER TAX INCOME ($ Thousands) 1983 Q3	1983 Q4	1983 TOTAL	1984 Q1	1984 Q2	1984 Q3	1984 Q4	1984 TOTAL	1985 Q1	1985 Q2	GROWTH (Percent) 1984/ 1983 %(+/-)	LAST 3 ROLLING QUARTERS	LAST 2 ROLLING QUARTRS
202 DATA SYS	10-30	15	195	452	76	20	14	2	112	5	3	-75	-97	-92
ACT	12-31	167	50	396	-94	179	23	59	167	83	135	-58	105	156
ADV.SYSTEMS	10-31	1697	1084	4809	989	802	335	1064	3190	1166	1204	-34	19	32
AGS COMPUTER	12-31	1560	2196	5785	1559	1307	1778	1195	5839	1925	1734	1	-4	28
AM. MGT. SYS	12-31	532	718	2012	449	643	812	937	2841	1269	1658	41	113	168
ANLYSTS INT.	06-30	-237	-213	-797	-310	-302	-149	78	-683	454	546	14	231	263
AUXTON COMP	12-31	394	425	1732	470	360	490	241	1561	340	461	-10	-17	-3
BDM INTERN'L	12-31	1629	1964	6346	1747	1921	2051	2354	8073	2130	2512	27	24	27
BBN	06-30	1091	1303	4260	1656	1879	1837	1978	7350	2190	2446	73	37	31
C.A.C.I.	06-30	12	1287	1942	-777	1461	564	658	1906	770	553	-2	1	93
COMP DATA	06-30	738	771	2590	860	509	824	817	3010	723	582	16	-1	-5
COMP HORIZ	02-28	453	626	1895	720	513	324	539	2096	643	666	11	-1	6
CSC	04-01	4397	4225	15826	7081	4637	3446	12403	27567	7232	5199	74	56	6
COMP TASK GR	12-31	406	379	1454	337	511	538	714	2100	773	893	44	94	96
DATA ARCHTS	11-30	-290	-1282	-1177	-319	322	230	367	600	306	364	151	181	22233
DYNAMICS RES	12-25	44	792	1007	-16	64	483	809	1340	437	252	33	78	1335
INTERMETRICS	02-28	-276	106	319	192	119	147	166	624	155	183	96	21	9
KEANE	12-31	8	10	232	91	145	169	214	619	233	191	167	159	80
LOGICON	03-31	1473	1564	5363	1680	1843	2071	2123	7717	2210	2378	44	32	30
PRC	06-30	3576	2885	11263	2304	2661	650	1625	7240	1398	2333	-36	-32	-25
RAND INFO.	02-28	7	2	-21	48	-47	-81	-892	-972	-236	-307	-4529	-47933	-54400
SYSCON CORP	11-30	915	1102	3495	895	1058	924	1188	4065	986	1103	16	7	7
SYST.& COMP.	09-30	2562	2288	8653	2569	2860	3000	2800	11229	627	97	30	-54	-87
TECHNALYSIS	12-31	243	272	928	224	250	271	276	1021	257	289	10	10	15
TOTALS		21116	22749	78764	22431	23715	20751	31715	98612	26076	25475	23	21	12

24 COMPANIES

LAST UPDATED: 10-01-85

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PUBLIC SOFTWARE PRODUCT VENDORS

V SOFTWARE PRODUCTS TRENDS ANALYSIS

- The rapid growth of the software products sector slowed significantly in the last quarter of 1984:
  - 1984 revenues grew 34% over 1983 (as compared to 47% for 1983 over 1982) while the nine months' comparison showed a 20% growth.
  - The rolling six months' revenue results show a 19% growth over the year-earlier period completing a pattern of rapid cooling in the industry's development.
  - During this last quarter, growth was 21%--a slight improvement.
- Net income has begun a recovery:
  - 1984 net income grew 8% over 1983 but was followed by a rolling nine months' contraction (-13%).
  - The last six months have seen a continuation of the contraction trend (-8%). These averages are impacted by ADR, BPI Systems, Hogan Systems, Information Sciences, MicroPro International, and NCA which all had poor quarters. In the last quarter the net income for the sample improved sharply, growing at 55%.
- This is still a very strong market in selected vertical and cross-industry markets but even the principal vendors are beginning to experience a slowdown:
  - Data base management systems companies like Cullinet, and Software AG grew more slowly and experienced a contraction in typical net income growth.
  - Lotus Development remains the star, still growing over 70% in the last three analysis periods, and net income growth over 30% in the same periods.
- Ashton Tate was added this quarter to bring the sample to 27 companies, representing 17% of the total software product industry's revenues.

update: 10/1/85

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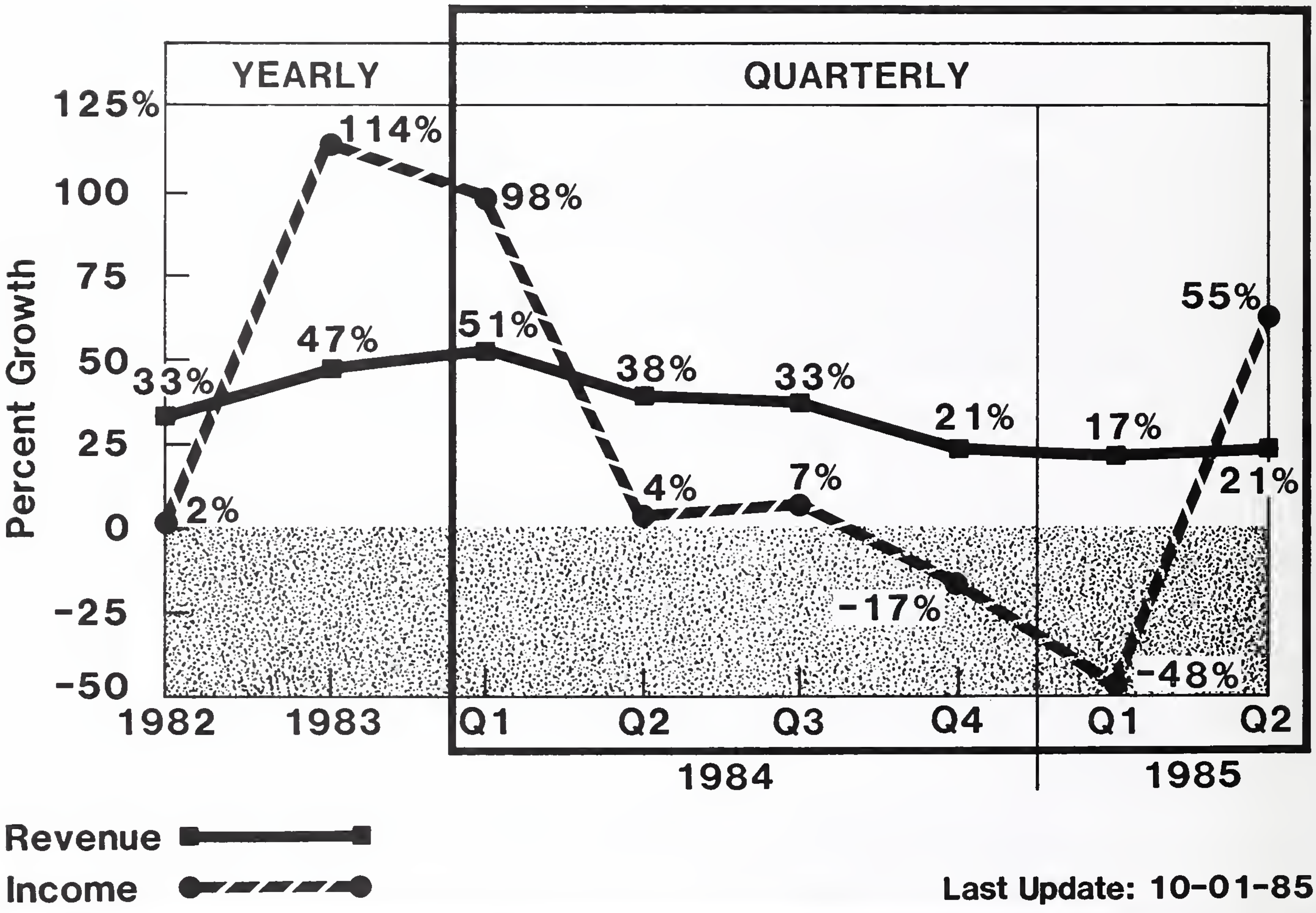
PUBLIC SOFTWARE PRODUCTS VENDORS



Last Update: 10-01-85

REVENUES OF PUBLIC SOFTWARE PRODUCTS COMPANIES

		REVENUE ($ Thousands)										GROWTH (Percent)		
		-------1983------------			--------------1984--------------------					-----1985-----		1984/	LAST 3	LAST 2
COMPANY NAME	FISCAL YEAR END	Q3	Q4	TOTAL	Q1	Q2	Q3	Q4	TOTAL	Q1	Q2	1983 %(+/-)	ROLLING QUARTERS	ROLLING QUARTRS
ADR	12-31	24864	30151	89086	21549	28523	33663	44469	128204	34300	30083	44	36	29
AMERICAN S/W	04-30	4701	6201	19161	5657	6581	7189	7992	27419	7813	8828	43	34	36
APPLIED COMM	09-30	3874	3567	15674	5676	6697	6875	5490	24738	6833	7997	58	27	20
ASHTON TATE	01-31	11433	13545	39846	11207	19193	24709	27172	82281	23971	27501	106	79	69
BGS SYSTEMS	01-31	2217	3617	9192	2546	2500	2349	3531	10926	2886	3157	19	11	20
BPI SYSTEMS	03-31	2670	2452	9335	2635	2495	2800	1692	9622	2361	2344	3	-16	-8
COMSERV	12-31	3807	5000	16321	5487	6291	6326	6771	24875	4520	8824	52	20	13
COMPUTER AS.	03-31	18240	26070	76694	24528	22009	31056	38766	116359	37169	31257	52	48	47
CONTINUUM	03-31	7249	8520	28059	8314	9157	9999	11410	38880	17827	19000	39	86	111
CULLINET	04-30	27703	31386	108358	35149	40265	43684	47423	166521	52728	42277	54	33	26
HOGAN SYST.	03-31	8524	7212	24978	16469	6695	11342	4604	39110	5604	4066	57	-53	-58
INFORMATICS	12-31	50262	59756	197892	50921	50076	53835	56982	211814	49918	55443	7	1	4
INF. SCIENCE	04-30	3970	8989	25801	12087	7336	6626	8038	34087	6849	6589	32	-24	-31
INNOVATIVE	06-30	480	656	1942	707	489	1380	1833	4409	1495	1600	127	166	159
INT.SOFT.SYS	12-31	6309	8686	24177	5904	6970	8852	11906	33632	7663	8673	39	31	27
LOTUS DEV.	12-31	16465	23903	53006	28269	32628	45649	50432	156978	44679	59276	196	82	71
MSA	12-31	30165	58163	145176	32250	31002	31218	56390	150860	24974	38124	4	-2	0
MICROPRO INT'L	08-31	16374	20555	59159	18887	15661	12384	11679	58611	9959	10275	-1	-42	-41
NCA CORP	12-31	4607	5181	17974	5501	6113	5115	6853	23582	5194	6054	31	8	-3
ON-LINE S/W	05-31	7777	6666	25824	6182	6583	6891	7322	26978	8226	8300	4	23	29
PANSOPHIC	04-30	11452	16125	49918	14966	12505	16658	20050	64179	18117	16257	29	25	25
POLCY MGMT	12-31	15701	17487	62268	19276	20977	21316	23246	84815	25032	25725	36	28	26
SCIENTIFIC S	12-31	10667	11600	30893	10323	9142	8332	11084	38881	7429	8144	26	-14	-20
SOFTECH	05-31	9530	12222	41624	10922	10884	7990	9054	38850	8998	10391	-7	-16	-11
SOFTWR AG	05-31	8663	9906	35030	10528	12030	11938	12657	47153	12055	14110	35	20	16
STERLING S/W	09-30	3932	4251	12376	4797	4582	5063	4850	19292	6043	6751	56	29	36
UCCEL	12-31	38000	44550	152963	39042	42974	42709	48708	173433	46144	48943	13	14	16
TOTALS		349636	446417	1372727	409779	420358	465948	540404	1836489	478787	509989	34	20	19

27 COMPANIES

LAST UPDATED: 10-01-85

NET INCOME OF SOFTWARE PRODUCTS COMPANIES

COMPANY NAME	FISCAL YEAR END	NET AFTER TAX INCOME ($ Thousands) 1983 Q3	1983 Q4	1983 TOTAL	1984 Q1	1984 Q2	1984 Q3	1984 Q4	1984 TOTAL	1985 Q1	1985 Q2	GROWTH (Percent) 1984/1983 %(+/-)	LAST 3 ROLLING QUARTERS	LAST 2 ROLLING QUARTRS
ADR	12-31	3114	4108	7460	333	1694	2542	5093	9662	600	-3140	30	-58	-225
AMERICAN S/W	04-30	956	1382	3994	961	1181	1235	1666	5043	1388	1282	26	23	25
APPLIED COMM	09-30	481	-401	972	673	926	1007	147	2753	734	1395	183	90	33
ASHTON TATE	01-31	1596	1765	6230	149	682	3483	3149	7463	2344	3456	20	245	598
BGS SYSTEMS	01-31	325	622	1335	143	92	23	860	1118	354	363	-16	84	205
BPI SYSTEMS	03-31	613	380	2027	269	-72	-1563	-714	-2080	-212	56	-203	-251	-179
COMSERV	12-31	-2855	-1000	-5813	-2840	-1874	-1135	-9747	-15596	-1967	1775	-168	-74	96
COMPUTER AS.	03-31	1583	4610	8446	2694	1024	2231	6283	12232	3562	1397	45	35	33
CONTINUUM	03-31	617	935	2703	518	1374	1107	1179	4178	2064	2100	55	89	120
CULLINET	04-30	3811	4230	15218	4812	5501	5977	6354	22644	6900	4233	49	20	8
HOGAN SYST.	03-31	1802	622	3603	4673	-1485	1007	-1352	2843	-12018	-2992	-21	-529	-571
INFORMATICS	12-31	2264	4354	8546	673	-1176	1050	4133	4680	68	-579	-45	-6	-2
INF. SCIENCE	04-30	-236	408	1738	1554	-1053	-1808	-6219	-7526	-2947	-847	-533	-1202	-857
INNOVATIVE	06-30	-155	-16	-19	-162	-1430	-812	-588	-2992	-298	-200	-15647	32	69
INT.SOFT.SYS	12-31	955	1583	3001	247	472	1184	2325	4228	420	613	41	46	44
LOTUS DEV.	12-31	4708	6773	14316	7495	7647	9102	11802	36046	9631	10744	152	47	35
MSA	12-31	-350	10195	10769	484	-1662	-1791	3212	243	-2721	3063	-98	-61	129
MICROPRO INT'L	08-31	2974	2902	9271	3130	620	-756	-620	2374	-870	468	-74	-115	-111
NCA CORP	12-31	321	274	1107	307	265	-502	155	225	-1202	-55	-80	-230	-320
ON-LINE S/W	05-31	787	-241	1039	-1146	-349	194	380	-921	646	500	-189	188	177
PANSOPHIC	04-30	2749	3382	8648	2197	1174	3001	4374	10746	3266	2038	24	43	57
POLCY MGMT	12-31	2631	2724	9728	3070	3371	3587	3680	13708	3827	3994	41	25	21
SCIENTIFIC S	12-31	1051	1500	3007	634	102	406	827	1969	-342	147	-35	-72	-126
SOFTECH	05-31	515	145	1907	301	547	-347	135	636	198	-1757	-67	-243	-284
SOFTWR AG	05-31	1118	1293	3141	1662	1783	1873	1876	7194	1276	990	129	-13	-34
STERLING S/W	09-30	317	170	1067	340	335	245	247	1167	641	576	9	73	80
UCCEL	12-31	220	1250	200	779	1649	3583	6024	12035	2362	3560	5918	225	144
TOTALS		31912	53949	123641	33950	21338	34123	44661	134072	17704	33180	8	-13	-8

27 COMPANIES

LAST UPDATED: 10-01-85

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PUBLIC TURNKEY SYSTEMS VENDORS

VI TURNKEY SYSTEMS TRENDS ANALYSIS

- The revenue trend of turnkey system vendors over the last 12 months has been one of steady growth, but a sharp slowdown is underway:
  - 1984 revenue grew 36% over 1983 (for the sample).
  - The rolling nine months' comparison shows a 17% growth.
  - The latest six months shows an 11% growth over the previous year.
  - The last quarter shows a 9% growth over the previous year.
- Net income has plummeted. In 1984 the companies listed averaged 57% growth over 1983. In the last quarter net income for the sample contracted by 80%.
- Outstanding performances are becoming rare and difficulties more numerous:
  - ASK Computer had a strong 50% growth in 1984 followed by 16% over the last nine months (on a growing revenue base) and a slow 7% in the last six months.
  - Avant Garde had shown dramatic gains in 1984 with revenue up over 60% and net income up 71%. In the last six-month period revenues are down 11% and net income is down 35%.
  - Computer Consoles showed a strong recovery with seven consecutive profit quarters until 1985. In the last two quarters losses have totalled $10 million.
  - Daisy Systems and Intergraph alone show steady revenue and net income growth. The overall net income picture is now abysmal with the exception of the former companies and others such as C3 and HBO.
- The sample this quarter is 18 companies representing 38% of the turnkey systems industry revenues.

update: 10/1/85

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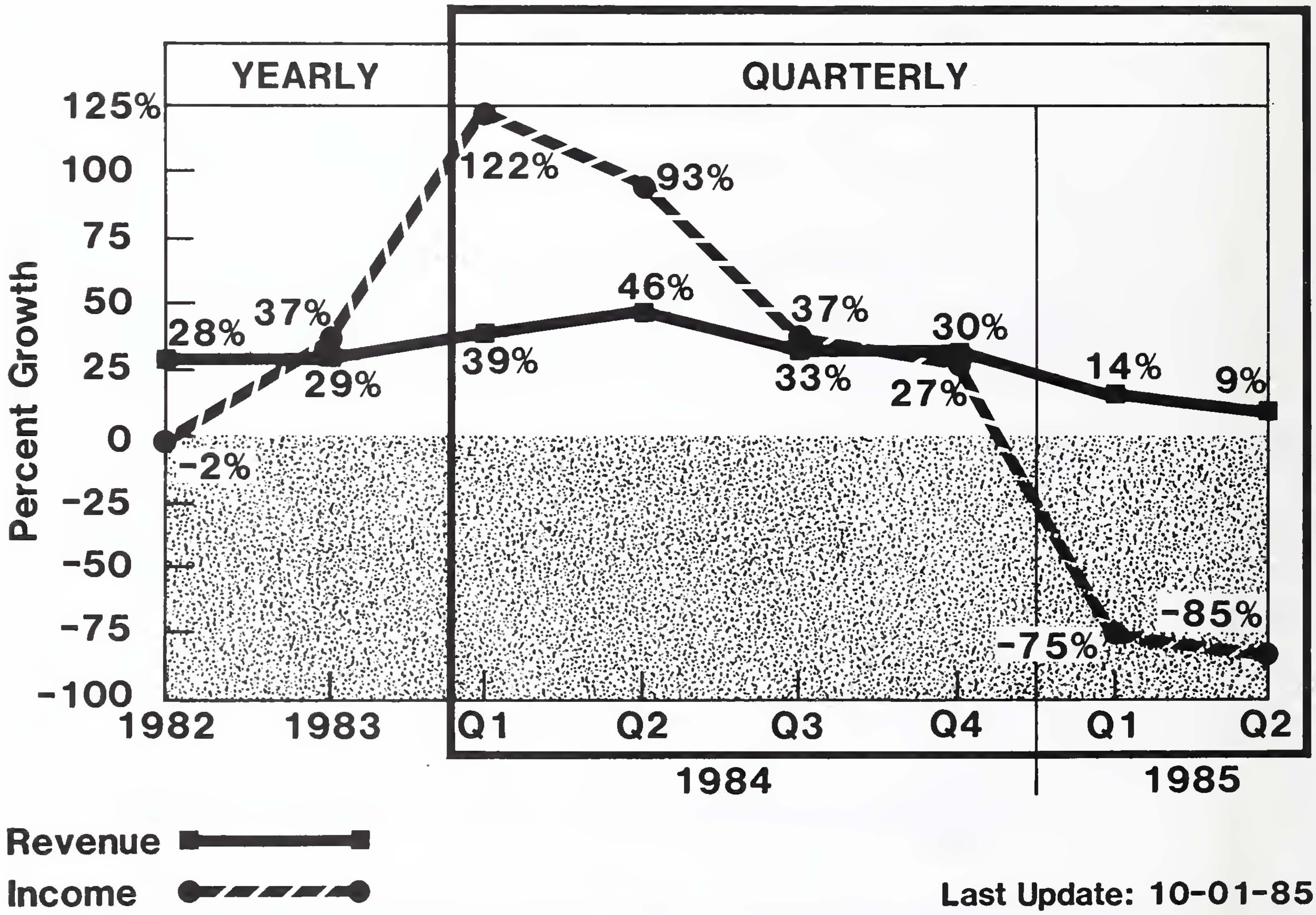
PUBLIC TURNKEY SYSTEMS VENDORS



Last Update: 10-01-85

REVENUES OF PUBLIC TURNKEY SYSTEMS COMPANIES

		REVENUE ($ Thousands)										GROWTH (Percent)		
		1983			1984					1985		1984/ 1983	LAST 3 ROLLING	LAST 2 ROLLING
COMPANY NAME	FISCAL YEAR END	Q3	Q4	TOTAL	Q1	Q2	Q3	Q4	TOTAL	Q1	Q2	%(+/-)	QUARTERS	QUARTRS
ASK	06-30	12460	15114	51213	17561	19941	18003	21282	76787	19187	20761	50	16	7
AUTO-TROL	12-31	15079	17129	54129	16272	17157	16773	18725	68927	18901	16383	27	7	6
AVANT-GARDE	04-30	3270	4106	12870	4987	5713	4901	5276	20877	3690	5555	62	-2	-14
C3	03-31	16500	12870	68735	15100	15496	18467	19700	68763	18758	19068	0	32	24
COMPTEK RES.	03-31	4793	5491	19508	6218	5986	6055	6315	24574	6685	6723	26	11	10
COMP CNSL	12-31	27614	38657	103550	27237	36088	33321	34543	131189	25976	35076	27	-6	-4
COMP DSGN	08-31	493	612	1921	610	574	504	720	2408	768	639	25	18	19
COMPUTERV	12-31	104026	111648	399942	121759	133589	137133	163861	556342	105871	112288	39	4	-15
DAISY SYST.	09-30	7315	13060	28320	15700	18538	21810	25484	81532	29042	32511	188	84	80
DIMIS INC.	12-31	1106	606	4109	571	718	236	323	1848	345	182	-55	-55	-59
GERBER	04-30	42929	42423	159053	53733	54586	52615	52530	213464	64427	48341	34	10	4
HBO	12-31	16499	19339	67624	20407	21807	22384	24084	88682	44171	46400	31	86	115
INTERGRAPH	12-31	59272	84604	244046	78702	98769	105480	120811	403762	108973	130556	65	37	35
NAT D. COM	10-31	5831	1544	11428	1967	1646	1780	1689	7082	1606	1667	-38	-4	-9
PENTA SYST.	12-31	7173	6040	21716	5692	5981	6322	6059	24054	4395	4500	11	-16	-24
REYNOLDS & R	09-30	66253	67163	263821	72827	74247	75571	74602	297247	82501	83215	13	12	13
TERA CORP	06-30	4362	4059	16812	3688	5343	6439	8257	23727	7215	1781	41	32	0
TRIAD	09-30	28600	24126	92097	31230	29949	35100	23905	120184	22431	27522	30	-13	-18
TOTALS		423575	468591	1620894	494261	546128	562894	608166	2211449	564942	593168	36	17	11

18 COMPANIES

LAST UPDATED: 10-01-85

NET INCOME OF PUBLIC TURNKEY SYSTEMS COMPANIES

COMPANY NAME	FISCAL YEAR END	NET AFTER TAX INCOME ($ Thousands) 1983 Q3	1983 Q4	1983 TOTAL	1984 Q1	1984 Q2	1984 Q3	1984 Q4	1984 TOTAL	1985 Q1	1985 Q2	GROWTH (Percent) 1984/1983 %(+/-)	LAST 3 ROLLING QUARTERS	LAST 2 ROLLING QUARTRS
ASK	06-30	991	1906	5139	1758	1487	1706	2138	7089	1788	2317	38	21	27
AUTO-TROL	12-31	416	968	-3276	773	1143	222	614	2752	-251	-4974	184	-260	-373
AVANT-GARDE	04-30	306	402	1048	527	626	396	245	1794	392	-269	71	-76	-89
C3	03-31	2000	436	8289	-400	1404	1303	742	3049	873	768	-63	65	63
COMPTEK RES.	03-31	227	271	917	432	330	338	322	1422	1323	268	55	85	109
COMP CNSL	12-31	4086	5691	10392	1314	2835	1390	751	6290	-5505	-4610	-39	-195	-344
COMP DSGN	08-31	47	5	75	17	14	246	98	375	73	74	400	581	374
COMPUTERV	12-31	9093	10439	35340	10750	7363	4692	14921	37726	-18766	-19510	7	-182	-311
DAISY SYST.	09-30	1703	2307	4845	2600	2785	3297	3954	12636	4685	5532	161	84	90
DIMIS INC.	12-31	-288	-780	-1767	-724	-256	-529	-718	-2227	-307	-357	-26	21	32
GERBER	04-30	3402	3698	11251	5197	5796	6424	6293	23710	6546	4331	111	17	-1
HBO	12-31	2657	2751	10001	3229	3420	3608	3639	13896	5867	6107	39	66	80
INTERGRAPH	12-31	7719	10649	29342	10304	16470	17366	18796	62936	14340	16735	114	33	16
NAT D. COM	10-31	606	-617	-3260	-14	-447	7125	-209	6455	-272	-1073	298	-44	-192
PENTA SYST.	12-31	939	265	1719	100	111	-482	-1273	-1544	-482	-400	-190	-553	-518
REYNOLDS & R	09-30	3973	3693	13816	4201	4462	4789	4121	17573	4784	4984	27	12	13
TERA CORP	06-30	-750	-717	-1811	-1720	-1251	30	66	-2875	-1389	-3099	-59	-20	-51
TRIAD	09-30	1900	430	1439	1651	1262	1500	-1623	2790	-3574	207	94	-249	-216
TOTALS		39027	41797	123499	39995	47554	53421	52877	193847	10125	7031	57	-46	-80

18 COMPANIES

LAST UPDATED: 10-01-85

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PUBLIC INFORMATION SERVICES VENDORS ANALYSIS

VII PUBLIC INFORMATION SERVICES VENDORS' ANALYSIS

- The comparison of the quarter growth rates (e.g., 1984 growth in QI compared to 1983 growth in QI for a given service sector) enables the rate of recovery (or lack thereof) to be clearly identified for each sector.

- The **processing services** sector appears to be entering another difficult period. Net income growth shows an uneven performance with vendors split into two groups: very successful and serious loss making. This quarter a much needed recovery in net income failed to materialize.

- The **software products** sector had a strong first three quarters in 1984 but slowed in 1985. Net income growth stopped in the last quarter of 1984 and the first quarter of 1985. The last quarter shows a sharp recovery, however.

- The **professional services** sector has plateaued in revenue and net income in the previous four quarters. Substantial growth was achieved in this quarter, however.

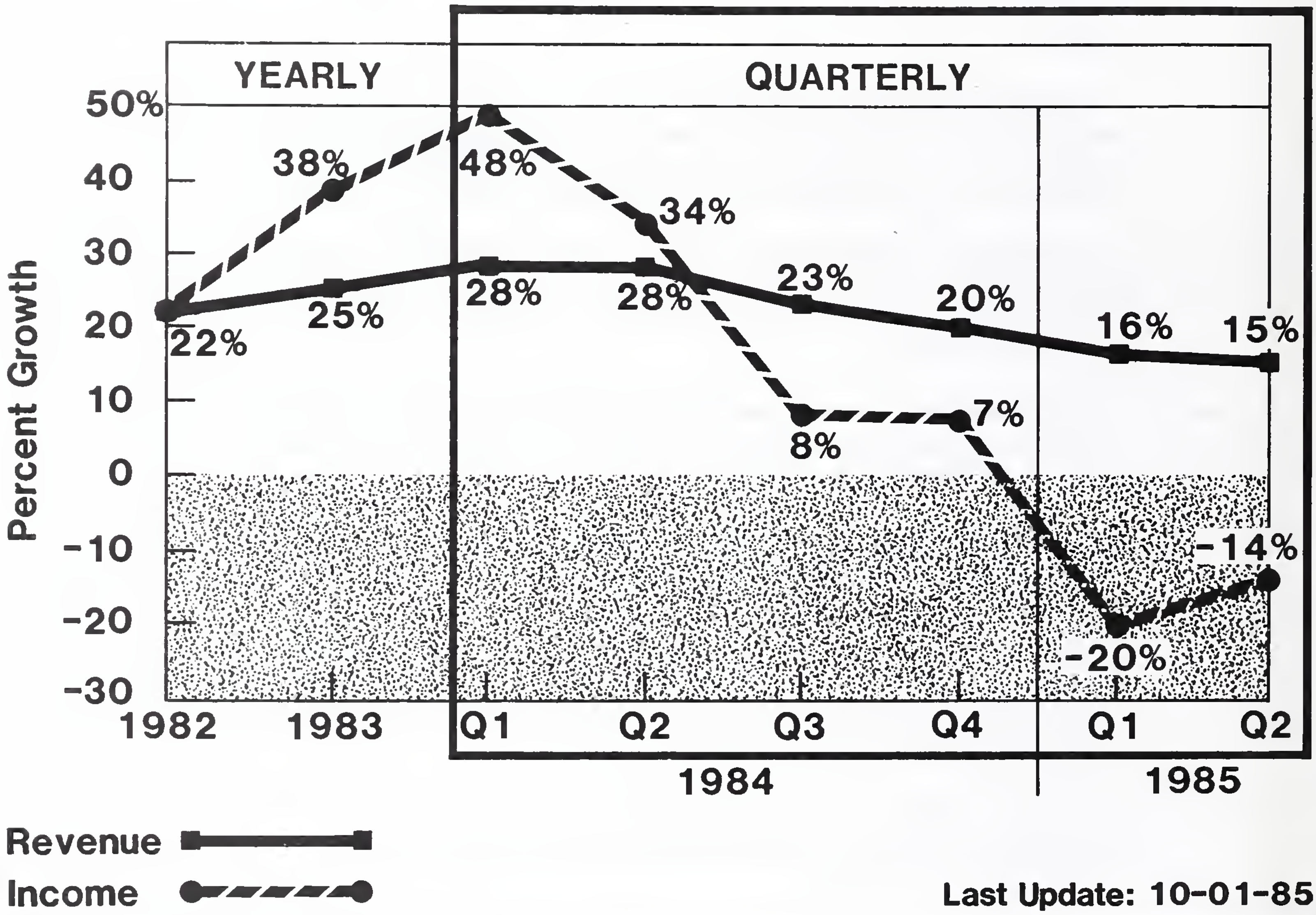
- **Turnkey systems** revenue growth cooled in the last two quarters. Net income shrank in both quarters and shows the worst growth picture of all the information services sectors.

- Overall, the information services industry dropped sharply in the first half of 1985 from an unspectacular 1984, but the second half results can be expected to improve. Net income is heavily impacted by the poor performance of the turnkey systems sector.

- The total sample has been increased this quarter to 101 companies representing 24% of the total information services industry.

update: 10/1/85

PUBLIC INFORMATION SERVICES VENDORS



Last Update: 10-01-85

PUBLIC INFORMATION SERVICES COMPANY PERFORMANCE, 1981 THRU 1984 ($ Millions Revenue)

SERVICE		Q1	Q2	Q3	Q4	PUBLIC ANNUAL TOTAL	SERVICES SECTOR TOTAL	SECTOR AS % OF INDSTRY	PUBLIC AS % OF SECTOR
PROCESSING (32 COS)	81 REV	387	391	402	420	1602	10290	46	16
	82 REV	465	472	472	506	1921	11164	42	17
	83 REV	551	563	578	629	2321	12611	40	18
	84 REV	687	692	702	746	2826	14169	36	20
	85 REV	796	787						
	82/81 %	20	21	17	20	20	8		
	83/82 %	18	19	22	24	21	13		
	84/83 %	25	23	21	19	22	12		
	85/84 %	16	14						
SOFTWARE(26 COS)	81 REV	142	167	175	219	703	4165	19	17
	82 REV	200	217	223	293	933	5766	22	16
	83 REV	272	304	350	446	1373	7703	24	18
	84 REV	410	420	466	540	1837	10569	27	17
	85 REV	479	510						
	82/81 %	41	30	27	34	33	38		
	83/82 %	36	40	57	52	47	34		
	84/83 %	51	38	33	21	34	37		
	85/84 %	17	21						
PROFESS. SER.(25 COS)	81 REV	415	416	417	445	1693	4993	22	34
	82 REV	480	478	484	508	1951	5981	23	33
	83 REV	540	547	577	589	2253	6938	22	32
	84 REV	614	631	642	673	2560	8584	22	30
	85 REV	708	752						
	82/81 %	16	15	16	14	15	20		
	83/82 %	13	14	19	16	15	16		
	84/83 %	14	15	11	14	14	24		
	85/84 %	15	19						
TURNKEY SYST. (18 COS)	81 REV	230	237	254	264	985	2884	13	34
	82 REV	306	300	307	346	1259	3604	14	35
	83 REV	356	373	424	469	1621	4342	14	37
	84 REV	494	546	563	608	2211	5775	15	38
	85 REV	565	593						
	82/81 %	33	27	21	31	28	25		
	83/82 %	16	24	38	36	29	20		
	84/83 %	39	46	33	30	36	33		
	85/84 %	14	9						
TOTALS (101 COS)	81 REV	1174	1211	1248	1348	4983	22332	100	22
	82 REV	1451	1467	1486	1653	6064	26516	100	23
	83 REV	1719	1787	1929	2133	7568	31595	100	24
	84 REV	2205	2289	2373	2567	9434	39096	100	24
	85 REV	2548	2642						
	82/81 %	24	21	19	23	22	19		
	83/82 %	18	22	30	29	25	19		
	84/83 %	28	28	23	20	25	24		
	85/84 %	16	15						

LAST UPDATED: 10-01-85

PUBLIC INFORMATION SERVICES COMPANY PERFORMANCE, 1981 THRU 1984 ($ Thousands Net Income)

SERVICE		Q1	Q2	Q3	Q4	PUBLIC ANNUAL TOTAL
PROCESSING (30 COS)	81 NET	32398	33763	29361	29321	124843
	82 NET	44321	47101	36093	43891	171406
	83 NET	57371	57553	43356	45886	204166
	84 NET	67064	66841	38515	46072	218492
	85 NET	77116	71031			
	82/81 %	37	40	23	50	37
	83/82 %	29	22	20	5	19
	84/83 %	17	16	-11	0	7
	85/84 %	15	6			
SOFTWARE(26 COS)	81 NET	7081	11914	13571	24189	56755
	82 NET	12331	13010	15138	17222	57701
	83 NET	17172	20608	31912	53949	123641
	84 NET	33950	21338	34123	44661	134072
	85 NET	17704	33180			
	82/81 %	74	9	12	-29	2
	83/82 %	39	58	111	213	114
	84/83 %	98	4	7	-17	8
	85/84 %	-48	55			
PROFESS. SER.(25 COS)	81 NET	10793	9495	8633	13122	42043
	82 NET	16631	15998	14776	16654	64059
	83 NET	18189	16710	21116	22749	78764
	84 NET	22431	23715	20751	31715	98612
	85 NET	26076	25475			
	82/81 %	54	68	71	27	52
	83/82 %	9	4	43	37	23
	84/83 %	23	42	-2	39	25
	85/84 %	16	7			
TURNKEY SYST. (18 COS)	81 NET	17594	31022	21616	21846	92078
	82 NET	23273	23972	19951	23089	90285
	83 NET	18019	24656	39027	41797	123499
	84 NET	39995	47554	53421	52877	193847
	85 NET	10125	7031			
	82/81 %	32	-23	-8	6	-2
	83/82 %	-23	3	96	81	37
	84/83 %	122	93	37	27	57
	85/84 %	-75	-85			
TOTALS (98 COS)	81 NET	67866	86194	73181	88478	315719
	82 NET	96556	100081	85958	100856	383451
	83 NET	110751	119527	135411	164381	530070
	84 NET	163440	159448	146810	175325	645023
	85 NET	131021	136717			
	82/81 %	42	16	17	14	21
	83/82 %	15	19	58	63	38
	84/83 %	48	33	8	7	22
	85/84 %	-20	-14			

LAST UPDATED: 10-01-85

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions. Continuing services are provided to users and vendors of computers, communications, and office products and services.

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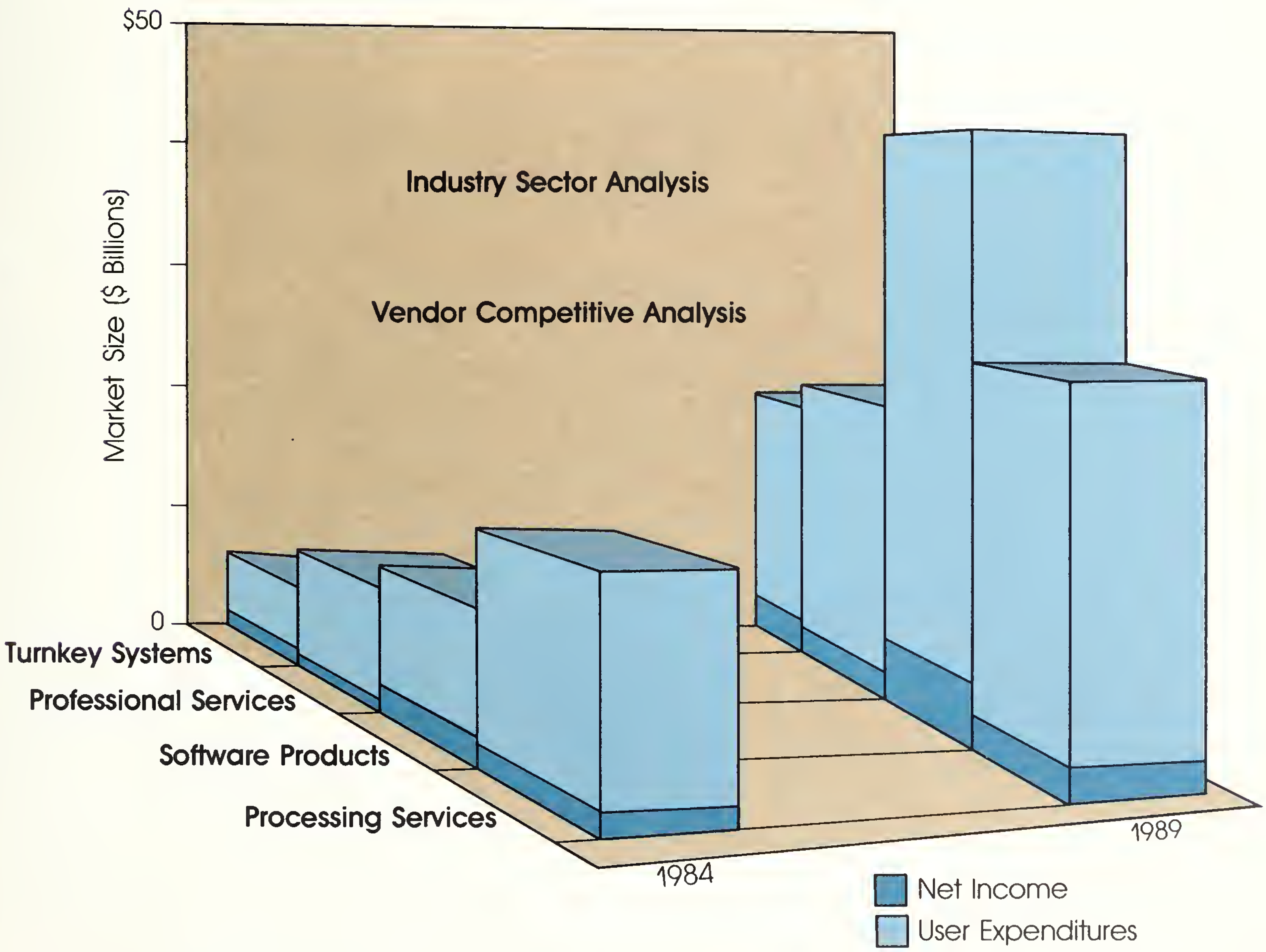

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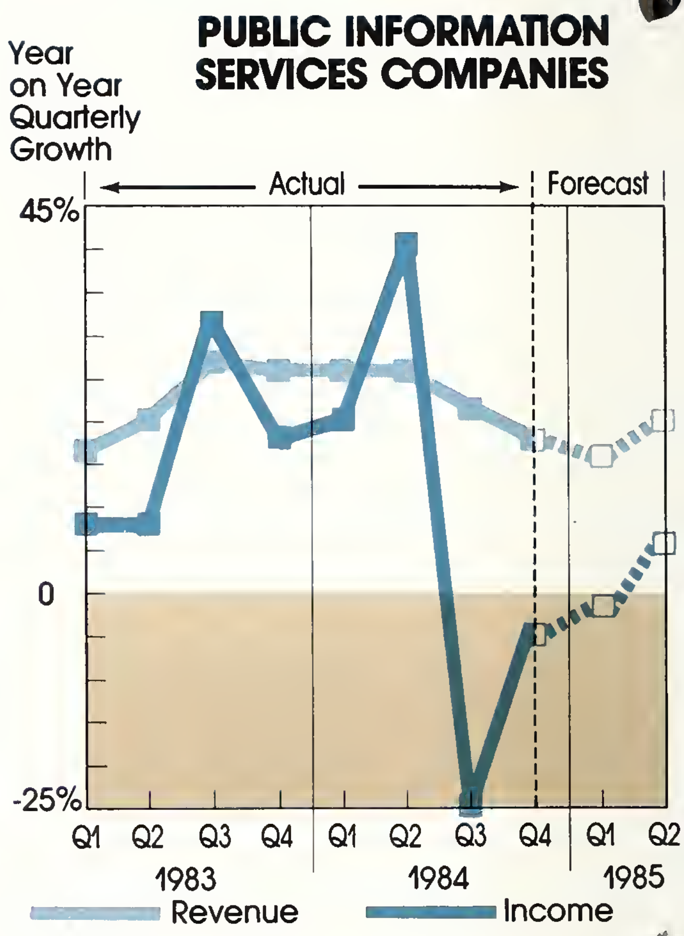

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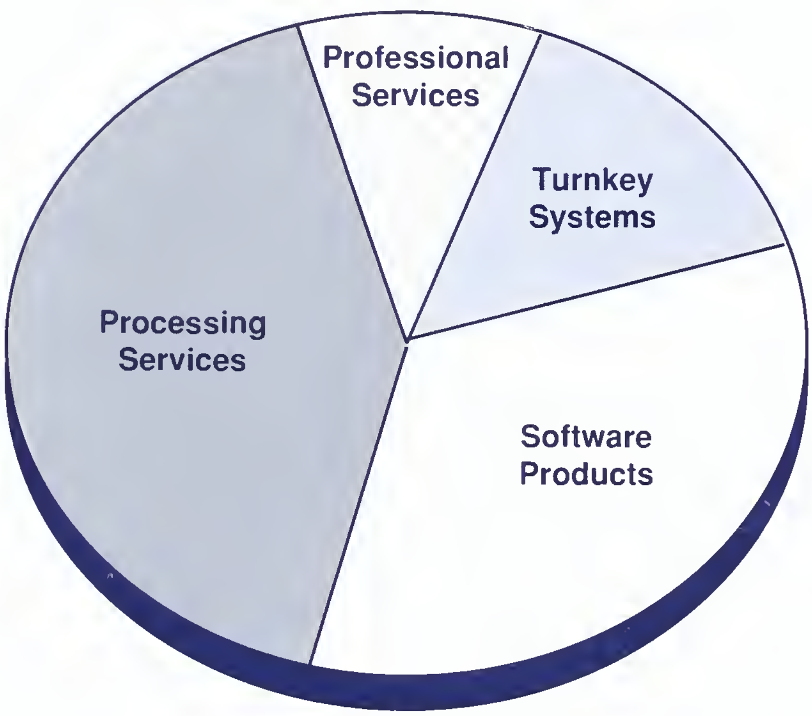

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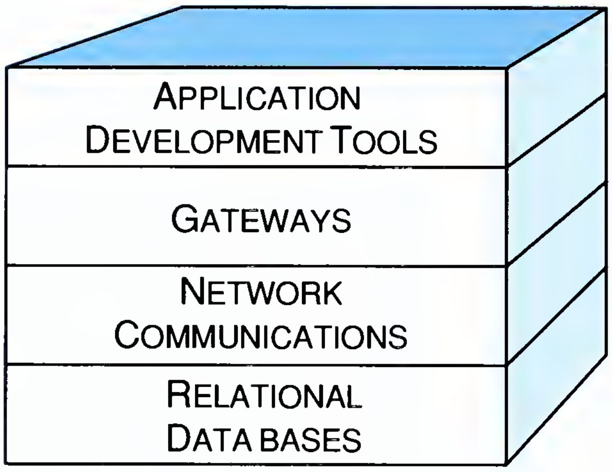
Volume I

Distributed DBMS An Early Look



This comprehensive report looks at Distributed Data Base Management Systems from the perspective of the IS executive. It gives a working definition of the concept, and through field research involving both users and vendors, provides a snapshot of the current state of the available technology and its level of implementation. The report provides an excellent overview of what to expect from this emerging technology.

- What is the status of Distributed Data Base Management Systems (DDBMS)? How do current software packages stack up?
- What are the opportunities and problems this emerging technology will present to Information Systems (IS) management?
- What are the likely applications and what are the keys to success?
- What are the implications of this new technology with regard to network and data architectures?
- What is the likely evolution of the application of this new technology over the next five years?

Study Content

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   B. Scope
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      2. Questions Addressed
      3. Report Organization

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   D. DDBMS - The Components
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      3. End User Issues
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         b. Understanding And Applying DBMS Technology
   B. The Early Experiences
      1. What Is Being Tried
      2. What Will Be Learned
      3. Where Will DDBMS Fit In
   C. The Critical Success Factors

VI. CONCLUSIONS AND RECOMMENDATIONS

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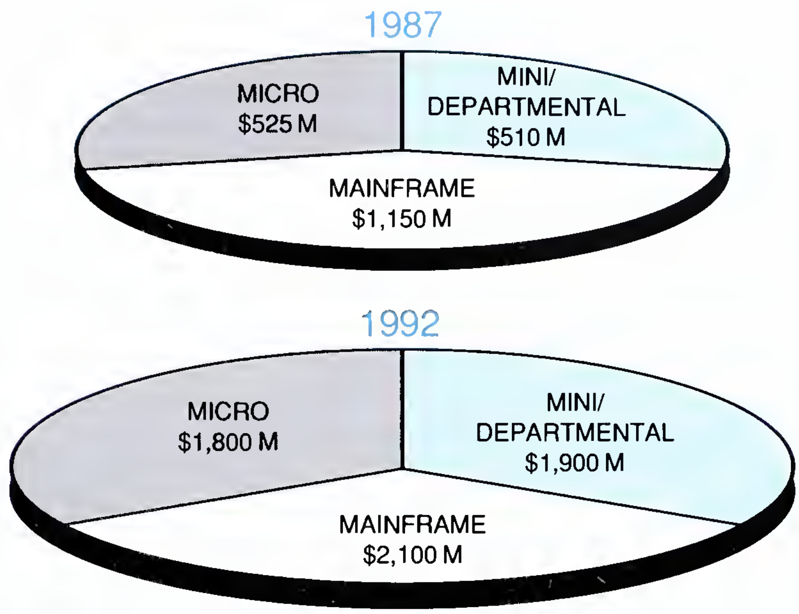
Volume II

Future DBMS Markets 1987-1992

This report provides analysis and a five-year forecast for the DBMS market. The forecast data provided includes market size and growth rates for DBMS products on micro, mini/departmental, and mainframe platforms. In addition, the report describes issues and trends that are driving the growth of the market and focuses on functionality critical to the DBMS vendors' success. Leading vendors are profiled to provide insight into how they are reacting to the opportunities available in the forecast period.



- ❑ What is the future direction of the DBMS market?
- ❑ Who are the significant participants in the marketplace?
- ❑ What is the potential for relational and distributed DBMS?
- ❑ What are the opportunities for vendors to participate?
- ❑ What functionality is key to marketing success?

Study Content

I. INTRODUCTION

II. EXECUTIVE OVERVIEW
   A. Evaluation of Data Base Management Systems
   B. DBMS Futures
   C. Distributed/Networked DBMS
   D. Functionality in Forecast Window
   E. Company Profiles - Ten Significant Participants
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   E. Oracle
   F. Relational Technology, Inc. (RTI)
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VI. ISSUES, RECOMMENDATIONS, AND CONCLUSIONS

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T H E R E

US PROFESSIONAL SERVICES MARKET 1987-1992

This report provides analysis and perspective, user expenditures, and forecasts for this rapidly growing market. Fourteen industries are the focus of the report and the issues, trends, and events that shape this market are presented and analyzed. Some of the MAJOR issues in this report are:

- Systems Integration and how this segment will grow
- Contract Services and the impact on Systems Integration
- Software Development and where this segment is headed
- Consulting Services and how the market will continue to grow
- Education and Training
- Facilities Management
- Federal vs Commercial segments
- How this market operates; business and market opportunities outlined and reviewed

REPORT #1

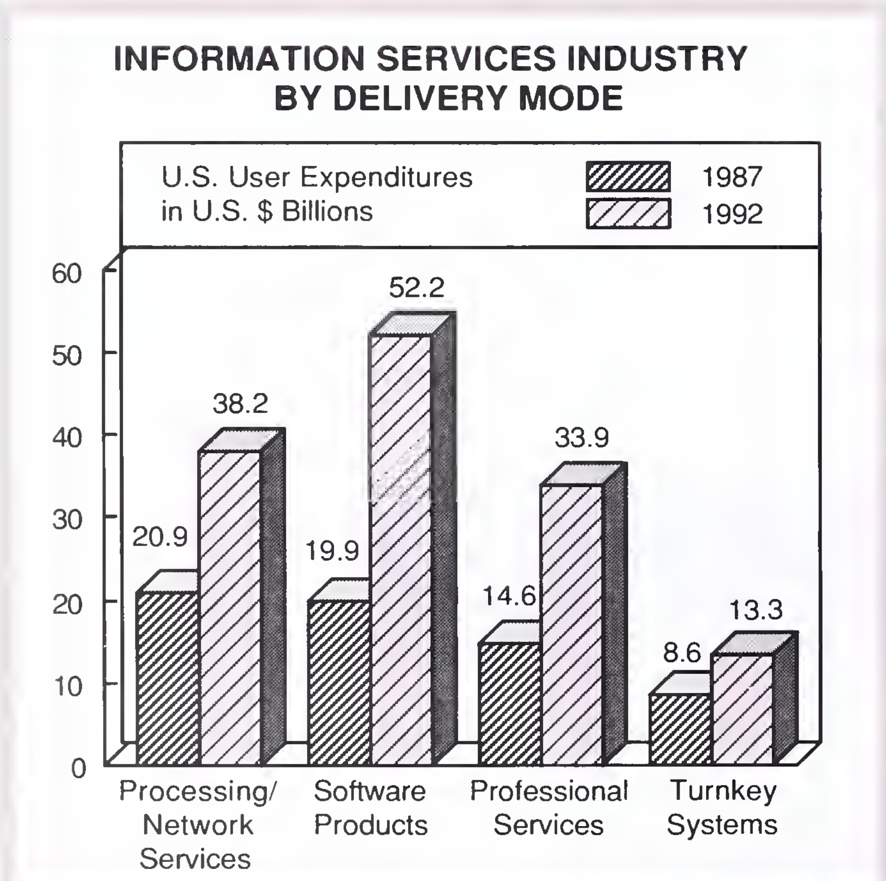
U.S. TURNKEY SYSTEMS MARKETS 1987-1992

This extensive look at turnkey systems usage, planning, and future will provide a real sense of the market. The data includes market size, growth rates, and exhibits that clearly illustrate the trends. Fourteen industry-specific market segments and six cross-industry segments are the basis of the report. MAJOR issues of the Turnkey Market that are highlighted are :

- The growth rate may be slow, but is DOUBLE the U.S. GNP
- How micros and workstations are impacting this segment
- The business niche where turnkey will always prevail: SERVICE SOLUTIONS
- Why custom applications will be an important target
- Value-Added will mean the difference between success and failure
- Using the installed base of customers to increase sales
- The manner in which Turnkey vendors do business is outlined, and business opportunities are reviewed

REPORT #2

REPORT SERIES OVERVIEW



The four volumes in this series are part of the INPUT Market Analysis and Planning Service (MAPS). This program is designed for the information services executive who requires top-drawer information that is currently used by leading U.S. and European companies. Now INPUT is pleased to offer these important studies to companies who do not yet subscribe to MAPS.

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The Information Services Reports offered by INPUT will better equip you and your organization for effective planning that is VITAL to your continued success. Many companies use INPUT reports to better understand their market position, to check their market assumptions, to realize user requirements for service, and to expand the scope of their realities.

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U.S. SOFTWARE PRODUCTS MARKET 1987-1992

This report gives the reader a five-year look at this important part of information services. Analysis and forecasts provide the reader with EXTENSIVE information that can help make planning decisions easier. Twenty different industry-specific and cross-industry markets are highlighted, as well as systems software. Issues and trends in the industry are explored, including recommendations that can aid all software companies. Take advantage of key events driving the market—order this report today. MAJOR topical issues of this report include:

- Differentiation of Mainframe, Mini, and Micro software applications
- The systems software market, including systems control, data center management tools, and application development tools
- Why software products are the fastest growing delivery mode in information services
- Where the software market will be in the next five years (surprising!)
- Applications software—how this segment will change and grow
- Where the business opportunities are for this leading-edge market niche

REPORT #3

US PROCESSING/NETWORK SERVICES 1987-1992

This report is a focus on processing and network services, an important part of the information services market. Although this is a mature market, there is STILL a lot of opportunity for the company that is aware of the trends.
Sectors reviewed in detail are Remote Computing/Batch services, On-line Data Bases, Value-Added Networks, Utility Processing, and Electronic Data Interchange. A thorough review of the competitive environment and trends results in substantial forecasts and recommendations. Some of the topics covered include:

- Growth in this segment. The market could DOUBLE in the next five years even though it is in a mature mode
- The subsegments of the market, such as financial and medical processing, and how each will be impacted in the years to come
- The On-Line Data Base Services market (OLDBS) and its impact on today's processing environment
- Value-Added Networks and factors that are contributing to the growth of this area
- New technologies that will help this segment expand
- Recommendations for business opportunities and company alliances

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The Systems Integration Opportunity

Systems Integration (SI), the provision of complex information systems requiring multiple products and services, has rocketed to a position of strategic interest and importance to both users and vendors.

Urgency of large-scale project development requirements, the multi-vendor nature of engagements, the absence of acceptable off-the-shelf solutions, the desire of buyers to share the risks of development, the desire for single-vendor interfaces, and a host of other forces are contributing to the shift to the SI approach.

By 1992, the total SI market (including both commercial and federal SI) is expected to grow to an astounding $13.7 billion!

Summary of the INPUT Service

Systems Integration Planning Service (SIPS) was jointly created and developed by INPUT and its clients—active commercial and federal SI vendors, major vendors planning to enter the SI arena and top-level information systems executives—to provide well-founded, clearly defined SI market planning information and services. As a client you will receive:

- Twelve months of continuous service
- SI Project Reports (monthly)
- SI Market Analysis Reports (three)
- Attendance to SI Seminars (three/year)
- SI Reporter Newsletter
- Hotline SI Client Inquiry Privileges
- Access to INPUT's SI Professionals
- Access to all INPUT Information Centers
- Presentation at your site

Positioning for SI Success

Vendors and users alike, must position themselves for success. Vendors engaged in SI or considering entry into the SI arena and users exploring the SI approach must find the answers to challenging SI questions.

INPUT's System Integration Planning Service (SIPS) provides research-based answers to these questions and more:

- What is Systems Integration? What are its component services?
- How will it impact other information services market opportunities (software, processing services, professional services, turnkey systems)?
- Will it significantly change today's and tomorrow's competitive environment? Who can afford to enter the game?

(Continued on next page)

INPUT Credentials

Our long history of SI-related research coupled with a reputation for work excellence makes INPUT a qualified resource.

Since 1974, INPUT has researched, analyzed and forecasted the size of the Information Services industry. In the early 1980s, INPUT first referred to "Systems Integration" as part of the professional services industry segment. This reference was founded upon even earlier research which revealed market potential in what was then called "custom integrated systems."

In 1983, INPUT released its first "standalone" SI study entitled, *Systems Integration Markets in the U.S. Federal Government*. Since that first work in 1983, INPUT has continued to build its body of SI knowledge through ongoing research and yearly release of this important study. INPUT's federal government systems integration knowledge base is backed by five years of solid market research.

In 1985, INPUT released the first of many commercial systems integration studies, *Systems Integration Opportunities and Challenges*. This two-volume analysis examined both the U.S. and Western European markets for CSI.

Since then, INPUT has conducted three more cornerstone studies: *Commercial Systems Integration Markets, 1986-1991*, and more recently, *Network Integration*, and *Commercial Systems Integration Implementations.*

That's five FSI studies, five CSI studies—not to mention the continuous FSI and CSI industry monitoring and tracking that's done to support INPUT's Information Services Industry Forecast Data Base.

And that's not all . . . since the early 1980s, INPUT has conducted a vast number of proprietary analyses of both the commercial and federal systems integration markets for leading players and high-potential candidates in the SI arena.

INPUT is qualified. Our clients say so. Let us show you.

Positioning . . . *from first page*

- What about strategic alliances? How do they work? What are the contractual issues?
- What is the user perception of SI?
- What's the size of the federal and non-federal SI markets? Where do the real market opportunities lie?

SIPS addresses these and a host of other SI questions and issues. Let us show you how we can help your company position for SI success.

SIPS

"A Full-Range of Research & Services"

SI Project Reports (SIPR)

"Details on Specific Projects"

SIPR identify and track both federal and non-federal systems integration projects. The SIPR data base now covers important projects already awarded and is building a solid base of pre-award SI project information.

SI Project Reports will include:

- Contractor Information (Company and Function)
  - Prime Contractor
  - Sub-Contractors
  - Outside Consultants
- Business Problem (Statement of Problem/Objectives)
- Major Tasks
- Contract Information
  - Type
  - Dollar Value
  - Duration
  - Schedule
  - Special Conditions
- Project Component Analysis (Component, Descriptions, Source)
  - IS Components
    - Computer and Communications Equipment
    - Professional Services
    - Software Products and Development
    - Maintenance
    - Systems Operation
    - Other Information Services Components
    - Other Non-Information Services Components
- INPUT Insights
  - Favored Vendors
  - Anticipated Margins
  - Alliances
  - Customer Satisfaction Levels
  - Future Plans
  - Other Relevant Information

You will receive monthly shipments of complete and concise SI Project Reports.

Complete SI Market Analysis

"Who, What, When, Where & Why"

Answers to these basic SI questions and more will be presented in INPUT's three-volume SI Market Analysis Report Series:

Volume I "SI Forecast and Trends"
Volume II "SI Competitive Analysis"
Volume III "SI Buyer Issues/Case Studies"

Forums for Understanding

"Forecasts, Issues, Experience"

INPUT will conduct three major meetings in 1988 to promote full understanding of INPUT's SI analyses and forecasts, SI market assumptions, forecast methodology, SI vendor and buyer issues, and to examine specific FSI and CSI cases. As a client you can attend:

#1 *SI Industry Forecasts and Trends Seminar*
March 15, 1988 in Washington, D.C.

#2 *Key Issues in SI – An Executive Forum*
May 17-18, 1988 in Chicago, IL

#3 *Annual Information Industry Conference*
September 28-30, 1988 in Scottsdale, AZ

(Continued on next page)

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"On-Going SI Client Support"

To complete the service, INPUT provides continuous client support throughout your service period (that's twelve full months from the time you authorize service). Our client support services are designed to fulfill your company's unique information needs. INPUT staff provides a highly professional level of research services not often found in today's environment.

You will receive:

- *Hotline Client Inquiry Service Privileges*
  INPUT analysts provide timely response to your most urgent SI questions. Your questions can be posed to INPUT by telephone, fax or telex.

  In addition to the questions you generate, INPUT SI specialists will call you with crucial "current event" information and/or data that they deem important to you and your firm.

  As events warrant, INPUT will deliver frequent issues of the *SI Reporter*, an informative systems integration newsletter.

- *Annual Presentation at Your Site.*
  An INPUT SI specialist will present the results of all 1988 SI research at your site. This important session is generally held during the fourth quarter of the calendar year. Presentation fees are included as part of your program; travel expenses are additional and will be billed separately, however.

- *Access to INPUT Information Centers.*
  SIPS clients may access any INPUT Information Center; California, New Jersey and Washington, D.C. Each center houses a complete set of all INPUT syndicated research. As a client, you may access all INPUT studies. Be our guest.

In Summary

Users are attracted to the potential of an SI approach which allows them to reduce the risk of major IS implementation projects and achieve maximum efficiency. Users must understand SI opportunities and pitfalls to determine viability of the SI approach.

Vendors view SI as an opportunity to enjoy large, long-term contracts resulting in a better competitive position; to achieve higher profits from the value-added services of SI; and to partner more closely with their customers.

To take advantage of new revenue opportunities vendors must be prepared to play for high stakes. Single project bidding costs alone could consume a vendor's total investment allocation—a single project failure could consume all but the largest vendors.

INPUT's Systems Integration Planning Service provides the information you need to make the best decisions, and plan for success. Let us show you—call INPUT today.

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1988

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1988 INFORMATION SERVICES INDUSTRY REPORT

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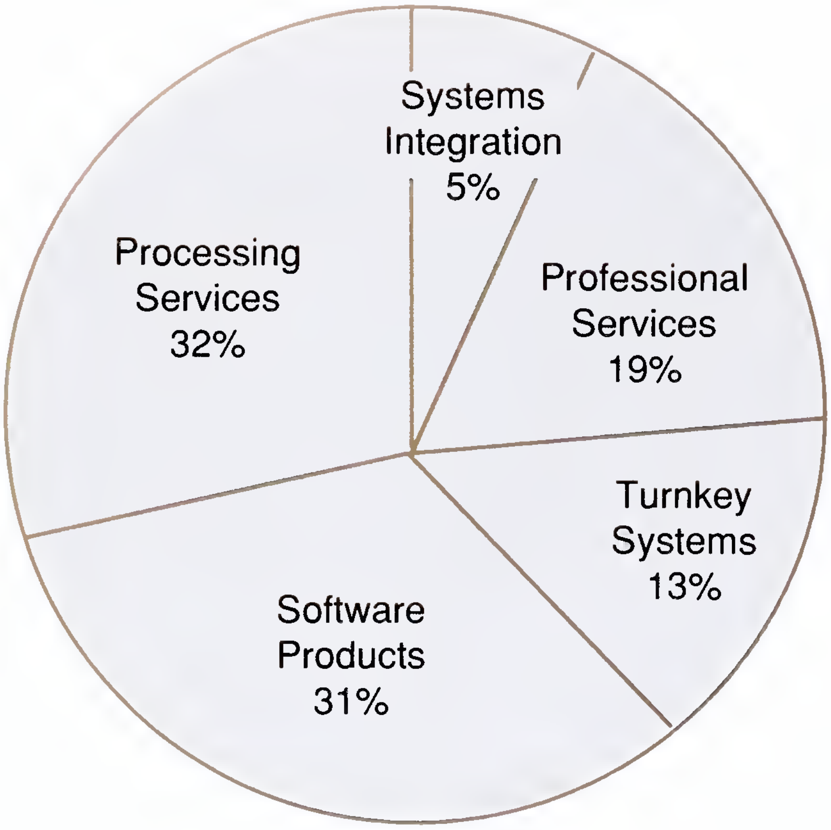

• 1987 Information Services Industry User Expenditures

Source: INPUT

HERE ARE THE KEY BENEFITS OF THIS REPORT

- New Sales Opportunities Revealed
- Market Size Identified and Quantified
- Key Vendors Analyzed
- Primary User Data Disclosed
- Planning Strategies Compared
- Review Factors That Speed Growth Rates
- Provide Research Data and Industry Trends

REPORT C

Executive Overview

Information services vendors, 1987
Industry trends and directions
Public company analysis
Industry forecasts, 1988-1993

Information Services Marketplace

Overview
Revenue distribution by mode of service
Growth rates by type and size of company
Revenue and growth rates by mode of service and type of company

Public Company Analysis

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Revenue and net income performance, 1[illegible]987
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Case study analysis of selected success stories

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Application software market and trends
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7 cross-industry markets
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Mainframe, mini, and micro software market size/growth

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REPORT SUMMARY

This twelfth-annual Information Services Industry report has more facts and useful information than ever before. The data is compiled from over 1,000 interviews with information services vendors of all sizes and service types. You will receive *clear and concise* data about this *65-billion-dollar market*. For more than fourteen years, leading information services vendors and users have relied upon INPUT for research-based analysis and forecast data. In this fast-moving industry, *reliable* data is the most important planning tool a manager or executive can use. All market sectors are covered in depth, with facts, figures, recommendations, and interpretations. Simply put, this report contains the most vital forecast information available, at a *fraction* of the cost of custom research. Order your copy today.

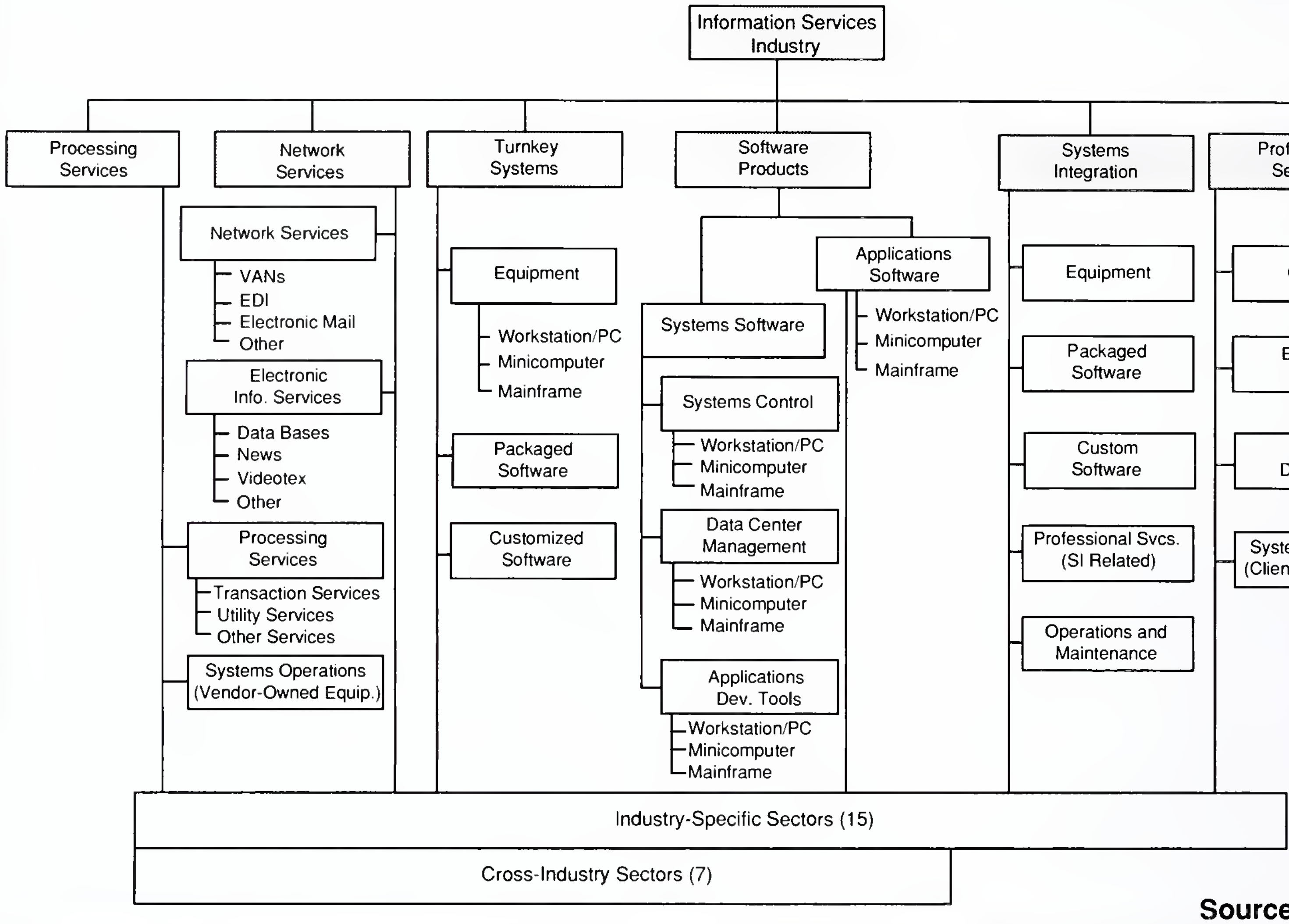
......the market will increase to
$143 billion dollars in 1993!......

KEY ELEMENTS OF THIS REPORT

- The size of the Information Services industry
- The size of your target market
- What services will provide rapid growth
- How your growth rate compares to industry averages
- Which markets offer the greatest potential for future growth
- Effective marketing strategies
- Analyses of key vendors within each service type
- Revenue and net income of public companies by service type
- Performance comparisons by size of company

THIS RESEARCH IS DONE IN-HOUSE BY INPUT
This information is not available from any other company

INFORMATION SERVICES
INDUSTRY STRUCTURE
1988



Source: INPUT

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INPUT provides planning information, analysis, and advisory services to major information services companies worldwide. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

INPUT carries out continuous and in-depth primary research. The company analyzes and interprets research data and develops recommendations and innovative ideas to meet the needs of the information systems and services industry.

INPUT's professional staff is experienced in both the user and vendor markets. Many staff members have over twenty years of experience in this business and have held senior management positions in marketing, planning, operations, and administration.

Formed in 1974, INPUT is a leading market research and consulting firm specializing in the information systems and services industry. Clients include the world's most technically advanced companies whose management receives ongoing advisory services, topical reports, conferences, and other planning data.

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Information Systems and Services Industry

Acquisition Services

Acquisition Services

According to the 1987 ADAPSO/Broadview Index, there were 358 merger/acquisition transactions valued at $4.9 billion in the U.S. Information Systems and Services industry.

In Europe, major acquisitions have taken place in 1988, resulting in the emergence of large services companies such as SD-Scicon, Cap Gemini Sogeti, and Sema Group. The pace in Europe is accelerating as '1992' looms on the horizon.

Through its 14 years of experience in the Information Services Industry, its extensive data base and unparalleled contacts around the world, INPUT offers its clients effective support in their acquisition processes.

INPUT can support its clients in all stages in the acquisition process:

1. *Preparation*
2. *Searching and Screening*
3. *Conclusion and Implementation*

INPUT is particularly well-equipped to assist companies in trans-Atlantic searches because of its offices in London, Paris, New York, Washington, and California.

INPUT's RELATIONSHIP WITH CLIENTS

For "Preparation" projects involving selection of markets and establishment of objectives, INPUT usually performs a consulting study on a fee basis. Based on the extent of the work, this may or may not be credited to a contingency fee.

On completion of the study or where the client already has established objectives, INPUT works through "Conclusion and Implementation" on a monthly retainer and contingency fee basis.

INPUT will not accept a retainer from another company with similar objectives while a retainer project is in process.

1. *PREPARATION*

INPUT can help initiate the acquisition process by carrying out a project to:

- Set Objectives
- Establish Strategy
- Define Method of Approach
- Select Target Characteristics
  - Size, Type, Location, etc.

In this project, INPUT will:

- Provide intelligence on the structure, size, and growth of the target market
  - Competitive position—leaders
  - Impact of new technology
  - Technical and marketing criteria for success
  - Successful and unsuccessful strategies
- Analyze characteristics of the client relative to acquisition:
  - Objectives/hopes/plans
  - Culture, management philosophy
  - Financial resources
  - Customer base
  - Resources, products, services, technology
  - Distribution/marketing/sales capability
  - Strengths and weaknesses
  - "Unfair advantages"

This project usually takes 2 to 4 weeks: A comprehensive industry plan can take 10 to 12 weeks.

2. SEARCHING AND SCREENING

- From the Objectives and Strategy INPUT forms a 'Rough Screen' of target characteristics.

Typical Screen Characteristics	
Type of Business	Services
Ownership	Market Position
Revenue Size	Technology
Profitability	Distribution
Growth	Support
Customer Base	Geography
Products	

- This screen is used for preliminary analysis. INPUT reviews its data base and contacts to identify candidate companies.

- These candidates are reviewed with the client to determine preferences and priorities.

- In the next stage, a 'fine screen' is used. Each selected company and its competitors are contacted. Company data is totally reevaluated.

- INPUT then presents and reviews the 'fine screen' results.

- With client approval, INPUT initiates the transaction process by making introductions to selected target(s).

3. CONCLUSION AND IMPLEMENTATION

- INPUT helps get the deal done— "closing!"

- INPUT helps in 'selling' the target company on being acquired. The amount and type of assistance varies from case to case. INPUT works with client's financial and legal personnel.

- INPUT can also carry out 'due diligence' projects:
  - Analysis of contracts
  - Customer satisfaction survey
  - Competitive analysis survey
  - Product and service assessment

- INPUT can prepare, or assist in the preparation of an implementation and operation plan:
  - 'Trauma' control
  - Method of operation
  - Reporting
  - Financial structure
  - Staff changes
  - Organizational changes
  - Market changes

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Computer/Communications Systems Industry

Customer Services in Europe 1988-1993

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Computer/Communications Systems Industry

Customer Services in Europe—1988-1993

CUSTOMER SERVICE ANALYSIS REPORT

Presents the results of 1,600 interviews of users of service by system size, country and vendor. Service and support functions analysed include response time, satisfaction levels and 'fix' time.

COUNTRY COVERAGE	
West Germany	France
U.K.	Italy
Belgium	Netherlands
Norway	Sweden
Spain	Switzerland

VENDOR COVERAGE	
IBM	Siemens
Olivetti	Digital
Honeywell-Bull	Nixdorf
Unisys	Hewlett-Packard
ICL	NCR
Wang	Amdahl
Concurrent	

CUSTOMER SERVICE ANALYSIS REPORT

Contains Analysis by:

- Country
- Vendor
- System Size
  - Small Systems
  - Midrange Systems
  - Large Systems
  - Associated Systems Software

Based on a survey of 1,600 service users

- This report presents and summarises data relating to user perceptions of service performance and needs in the Customer Services Market of the computer industry throughout Western Europe.
- The Customer Service Market is forecast for 1988-1993
- The data presented has been collected by INPUT during 1988 in a survey of computer users in the 10 countries opposite.
- The report is presented in such a way that Service and Marketing directors and managers can assess their company's performance against that of their competitors on key aspects of support, and also compare various performance factors in the individual countries.
- Vendor and country analyses provide detailed customer satisfaction levels with hardware and systems software support.
- In addition, the report contains information relating trends between 1987 and 1988 for defined aspects of service. This data will allow comparison of changes in customer needs with service performance achieved and provide guidance for the shaping of future service strategies.
- The report can also be used to prepare company responses to surveyed customer views and opinions in order to address issues related to customer satisfaction.

This major report contains over 250 pages, including 300 exhibits.

CUSTOMER SERVICE PROGRAMME—EUROPE

The Customer Service Analysis report is one of a series of studies in this programme.

Early subscribers to the report can have at no charge one of the following European Customer Service Studies:

- *Professional Services Opportunities—Europe*
- *Pricing Trends*
- *International Maintenance, 1988-1993*
- *Disaster Recovery*
- *Inventory Control of Services*
- *Education and Training Markets*
- *Customer Service Automation*

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Complete the enclosed authorization form immediately and qualify for:

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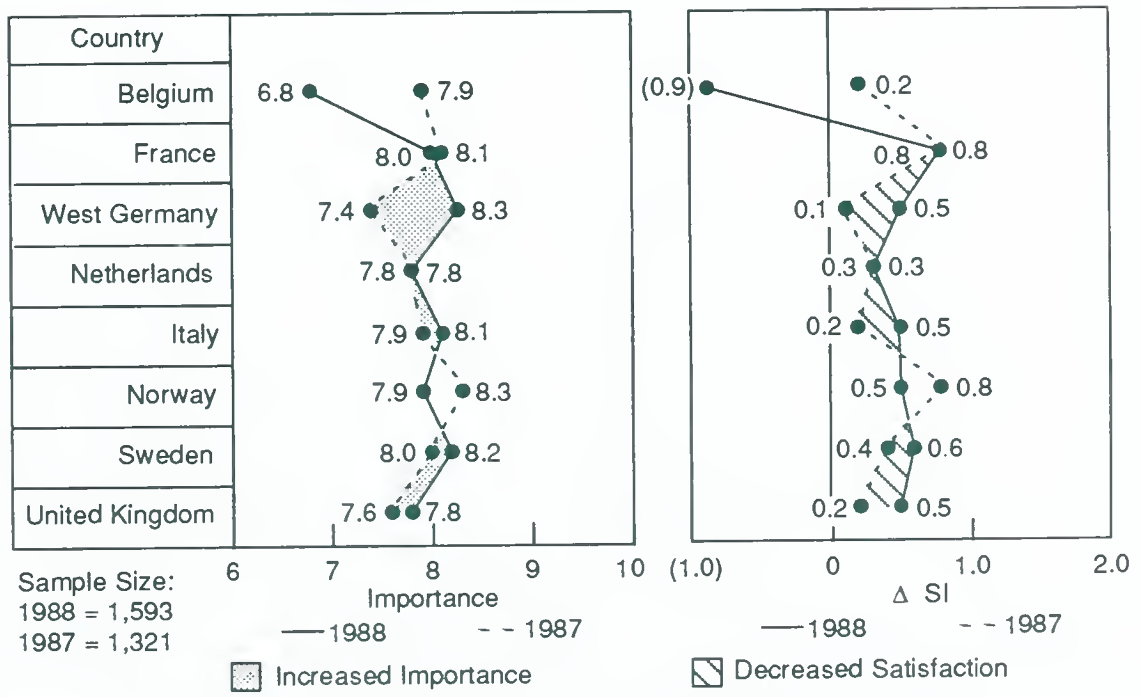
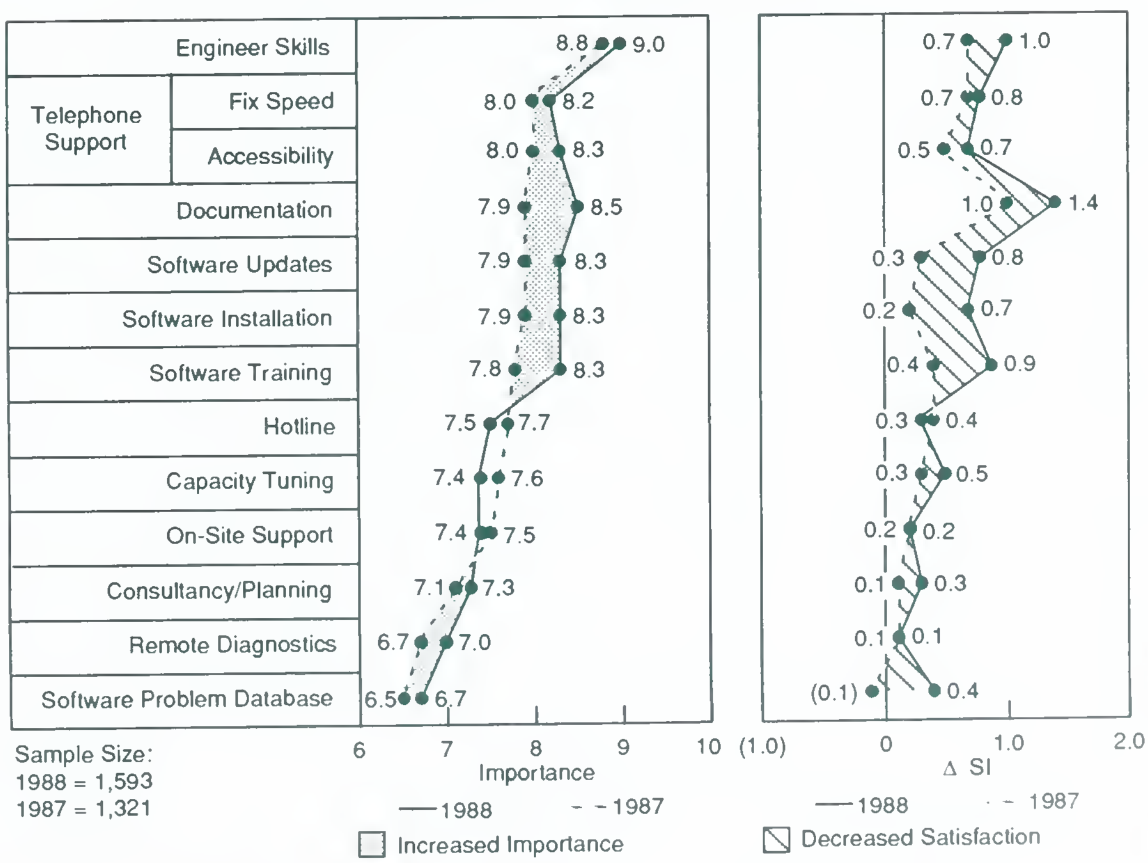
HARDWARE SERVICE TRENDS, 1987-1988



Note: 1987 Data for Spain and Switzerland Is Not Available.

WESTERN EUROPE
SOFTWARE SUPPORT TRENDS, 1987-1988



Sample exhibits from the report.

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This major report:

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- Examines key customer service issues
- Identifies trends that could help or hinder success
- Pinpoints new opportunities for service revenue
- Recommends specific action to increase revenue

CUSTOMER SERVICE USER REQUIREMENTS REPORTS

Four Customer Service User Requirements Reports are produced: Large Systems, Midrange Systems, PCs/Workstations, and Third-Party Maintenance (TPM). Each report measures the importance of service components and user satisfaction with vendor performance for:

- Equipment maintenance
- Software support
- Professional services
- Education and training services
- Documentation

CUSTOMER SERVICE VENDOR ANALYSIS REPORTS

Four Customer Service Vendor Analysis Reports are produced: Large Systems, Midrange Systems, PCs/Workstations, and TPM. Each report:

- Profiles key service vendors
- Analyzes service discounting, warranty, and pricing practices and trends
- Addresses marketing tactics and strategies
- Examines specific service offerings

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CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

Customer Service Newsletter
Questions posed by our clients through the "Hotline" Inquiry Service along with answers are reported. Current topics in the U.S. and Europe in customer service are analyzed—e.g., new vendor pricing strategies or service offerings.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

Customer Service Conference
INPUT analyses and forecasts are presented and discussed. Vendor strategies and key industry trends will be presented.

Joint Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Customer Service Program—Europe covers the European equipment and software maintenance and support industry.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

CUSTOMER SERVICE MARKET REPORT

- Contains Market Forecasts (1989-1994)
- Customer Service Market Categories:
  - Large Systems
  - Midrange Systems
  - PC/Workstations
  - Third-Party Maintenance

LARGE SYSTEMS MODULE

- User Requirements Report
- Vendor Analysis Report

MIDRANGE SYSTEMS MODULE

- User Requirements Report
- Vendor Analysis Report

PCs/WORKSTATIONS MODULE

- User Requirements Report
- Vendor Analysis Report

THIRD-PARTY MAINTENANCE MODULE

- User Requirements Report
- Vendor Analysis Report

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- On-Site Visit
- Customer Service Newsletter
- Customer Service Conference
- Joint Client Conference

About INPUT

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INPUT®

Information Systems Industry

Customer Service Program—Europe

Customer Service Program—Europe

EFFECTIVE PLANNING FOR EFFECTIVE PERFORMANCE

INPUT's Customer Service Program provides the detailed customer service information you need to forecast service requirements, analyze competition, and address the challenges of new technology.

You receive research-based studies and support services which address questions such as:

- What services do your users really require and how can you meet their needs most efficiently?
- What is the competition doing and how should you respond?
- Where are the sources of service revenue growth for the next five years?
- How will increases in hardware reliability and software complexity affect your personnel mix?
- What are the new service techniques and how are they being received in the marketplace?

VENDOR COVERAGE	
IBM	Siemens
Olivetti	Digital
Honeywell-Bull	Nixdorf
Unisys	Hewlett-Packard
ICL	NCR
Wang	Amdahl

CUSTOMER SERVICE ANALYSIS REPORT

Presents the results of 2,000 interviews of users of service by system size, country and vendor. Service and support functions analyzed include response time, satisfaction levels, and 'fix' time.

COUNTRY COVERAGE	
West Germany	France
U.K.	Italy
Belgium	Netherlands
Norway	Sweden
Spain	Switzerland

MARKET/ISSUE REPORTS

Independent Maintenance Markets, 1989-1993
Analyzes and forecasts individual 'third-party' maintenance markets in Europe as well as profiling vendors and user reactions to independent maintenance.

Customer Service Pricing Trends
Examines customer perceptions and trends in pricing for systems software and hardware support.

Software Maintenance and Support
Examines vendor strategies for pricing and delivery; forecasts trends in this fast-changing market.

The Impact of Service Quality Standards
Looks at the impact of quality standards BS 5750 and ISO 9000.

Fourth-Party Maintenance Opportunities
Surveys this growing market and identifies opportunities for maintenance vendors.

Vendor Service Revenue Analysis
Analyzes vendor revenue streams in service and forecasts the growth areas and opportunities.

One other 'topical' issue report—to be defined.

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On-Site Visits
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

Bimonthly Customer Service Newsletter
Topical news is provided about customer service in Europe and the USA (e.g., new vendor service policies, service offerings, vendor performance).

RELATED SERVICES

- Customer Service Program—U.S. covers the U.S. hardware and software maintenance and support industry.
- Custom Research and Consulting Projects on particular customer service issues such as customer satisfaction, pricing, competition, etc.

PROGRAM DESCRIPTION

CUSTOMER SERVICE ANALYSIS REPORT

Contains Analysis by:

- Country
- Vendor
- System Size
  - Small Systems
  - Mid-Range Systems
  - Large Systems
  - Associated Systems Software

Based on a survey of 2,000 service users

MARKET/ISSUE REPORTS

- Independent Maintenance Markets
- Customer Service Pricing Trends
- Software Maintenance and Support
- The Impact of Service Quality Standards
- Fourth-Party Maintenance Opportunities
- Vendor Service Revenue Analysis
- To Be Defined

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visits
- Bimonthly Newsletter

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INPUT®

Information Services Industry

Electronic Data Interchange Program—U.S.

Electronic Data Interchange Program—U.S.

PLAN FOR SUCCESS

INPUT's EDI Program is a continuing service that provides timely and accurate intelligence on a quickly growing network service application. How much you know about EDI and when you find out could spell the difference between success or failure in your EDI endeavors.

ANALYSIS REPORTS

EDI Intertrends—North America/Europe
Two studies, results of in-depth interviews with EDI users, network service companies, software firms, and professional service providers, analyze the EDI market for 1989 to 1994. User expenditures for EDI services and products are forecast. Examines trends and directions.

Advanced EDI Services
Examines user needs and vendor directions in providing a range of value-added services in association with EDI, including: graphics, EDI/EFT, data bases and catalogs, on-network translation, interactive EDI, priority delivery options, hardcopy and FAX conversions, etc.

EDI User Case Studies
Drawing on INPUT's experience with our 1988 *User Case Studies Report*, this user-oriented report describes developments at several companies implementing EDI solutions. Characteristics of success and failure are analyzed.

U.S. Federal Government Impact on EDI
The Federal Government will be a major force in the implementation of EDI in the U.S. This report examines its direct role in implementing EDI with its 500,000 suppliers and also its influence through standards and regulation.

EDI STANDARDS REFERENCE GUIDE

This compendium of EDI standards in U.S., Europe, and other geographic sectors is constantly updated. It provides a reference guide to relevant standards, significant changes, and responsible standards organizations.

EDI REPORTER NEWSLETTER

The latest information on vital EDI issues, events, vendor actions, and user experiences are presented in this monthly, international newsletter. First published in early 1987, *EDI Reporter* has become the most relied-upon source of timely EDI information.

EDI CONFERENCES

INPUT will conduct *two* EDI conferences in 1989—one in San Francisco and one in London. Each conference presents forecasts, trends, and directions from EDI users, vendors, and INPUT consultants. Each conference includes a unique social event for informal information interchanges.

MULTICLIENT STUDY

INPUT proposes to carry out a multiclient research project on Electronic Medical Claims. This project will include a seminar.

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RELATED SERVICES

- Multinational Network Program provides information for planning and operating multinational telecommunications networks.
- Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

EDI ANALYSIS REPORTS

- EDI Intertrends—North America
- EDI Intertrends—Europe
- Advanced EDI Services
- EDI User Case Studies
- U.S. Federal Government Impact on EDI

EDI STANDARDS REFERENCE GUIDE

- U.S., Europe, and Other Areas
- Standards Organizations
- Standards and Changes

EDI REPORTER NEWSLETTER

- Monthly
- Issues, Events, Interviews
- Users, Vendors
- International Scope

EDI INDUSTRY CONFERENCES*

- Two-Day, Users/Vendors, San Francisco
- Two-Day, Users/Vendors, London

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Client Conference

* U.S. clients may attend the London EDI Conference at an incremental fee.

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Electronic Data Interchange Programme—Europe

Electronic Data Interchange Programme—Europe

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ANALYSIS REPORTS

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Two studies that analyse the EDI market for 1989 to 1994 as a result of in-depth interviews with EDI users, network service companies, software firms and professional service providers. User expenditures for EDI services and products are forecast. Examines the entire North American and Western European EDI market, trends and directions.

Advanced EDI Services
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Joint Client Conference
Held in London during the fourth quarter of 1989, this annual conference enables INPUT's clients to be updated on key strategic information industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Multinational Network Program provides information for planning and operating multinational telecommunications networks.
- Market Analysis Programme analyses the computer/communications software and services markets in the U.S. and Western Europe.
- Vendor Analysis Programme provides company profiles and support data on U.S. and European software and services vendors.
- Custom Research and Consulting projects analyze market opportunities, user needs, competition, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups or other functions.

PROGRAMME DESCRIPTION

EDI ANALYSIS REPORTS

- EDI Intertrends—North America
- EDI Intertrends—Europe
- Advanced EDI Services
- EDI User Case Studies

EDI STANDARDS REFERENCE GUIDE

- U.S., Europe and other areas
- Standards Organisations
- Standards and Changes

EDI REPORTER NEWSLETTER

- Monthly
- Issues, Events, Interviews
- Users, Vendors
- International Scope

EDI INDUSTRY CONFERENCES*

- Two-day, Users/Vendors, San Francisco
- Two-Day, Users/Vendors, London

CLIENT SUPPORT

- Access to INPUT Consultants
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- Joint Client Conference

* European clients may attend the San Francisco EDI Conference at an incremental fee.

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INPUT®

U.S. Information Systems and Services Industry

Federal Information Systems and Services Program

Federal Information Systems and Services Program

FEDERAL MARKET OPPORTUNITY

The federal government will spend more than $18 billion dollars annually on computer systems, computer services, software, and communications by 1992.

The majority of these dollars will be won by vendors well informed about federal procurement plans and practices. INPUT's Federal Information Systems and Services Program can help you win federal business.

PROCUREMENT ANALYSIS REPORTS

These reports, issued monthly, identify and track individual Defense and Civil Agency procurement opportunities up to five years in advance of RFP release; indexed by agency, fiscal year of start, and system/service mode.

PROCUREMENT ANALYSIS REPORTS

Agency Name
Program Title
Funding by Fiscal Year
Procurement Schedule Target Dates
- Draft
- CBD Announcement
- Pre-Bid Conference
- RFP-RFQ Release
- Bid Due Date
- Award Date

Description of Program
Systems/Services to Be Acquired
Contract Types
Contract Duration
Contracting Office (Name and Address)
Program Office (Name and Address)
Background/Function
Analysis
Acquisition Plan
Awards to Date

MARKET ANALYSIS REPORTS

Each Market Analysis Report contains 5-year market forecasts.

Federal Microcomputer Market
Analyzes the federal market for microcomputers. Discusses applications, organizational, targets and software strategies. Assesses the growth of government contracts for microcomputers and the impact on competition.

Defense Logistics Agency Information Services Market
Addresses the growing importance of automation in providing logistics support. Discusses the status and future of the Logistics System Modernization Program, as well as the degree of systems standardization throughout DLA.

Federal Computer Security Market
Analyzes the market for hardware, software, and services to support federal security concerns. Assesses present and future compliance with the Computer Security Act of 1986, and its impact on market trends.

Federal Professional Services Market
Forecasts the professional services market, including consulting, education, training, programming and analysis, operational support (facilities management), and additional areas.

Federal Systems Integration Market
Forecasts the federal systems integration market by component. Analyzes agency trends toward fewer and larger procurements and the resulting impact on teaming arrangements among vendors.

Federal Processing Services and Operational Support Markets
Discusses the forecasts and relationship of these two market segments. Analyzes trends, agency strategies, and procurement opportunities.

Federal Software Products and Related Services Market
Forecasts software products and related services markets. Analyzes the impact of the emphasis OMB is placing on software products, as well as governmentwide trends in software certification.

INPUT®

FEDERAL SYSTEMS AND SERVICES CONFERENCE

Two-day conference, held in Washington, D.C., covers INPUT federal market research. Expenditure forecasts are presented together with presentations by government and industry leaders on trends, policies, and methods.

CLIENT SUPPORT

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"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data. It handles FOIA requests (at nominal additional fees).

Federal Information Center
Clients have access to INPUT's Federal Information Center which houses hundreds of agency planning, budget, and procurement documents, and a wide array of government-related research sources and all other INPUT program reports.

INPUT Client Conference
This annual conference for all INPUT's clients is on key strategic industry trends and developments. INPUT forecasts are presented and discussed. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Custom Research and Consulting projects can provide agency research, competitive analysis, acquisition search, contract award research, agency selection practice assessment, and specialized forecasting.

- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

PROCUREMENT ANALYSIS REPORTS

- Defense & Civil Agencies
- Indexed by Agency, Fiscal Year Start, and Systems/ Service Mode
- Monthly Reports

MARKET ANALYSIS REPORTS

- Federal Microcomputer Market
- Defense Logistics Agency Information Services Market
- Federal Computer Security Market
- Federal Professional Services Market
- Federal Systems Integration Market
- Federal Processing Services & Operational Support Markets
- Federal Software Products & Related Services Market

FEDERAL SYSTEMS & SERVICES CONFERENCE

- 2-day, Washington, D.C.

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Information Systems Industry

Information Systems Program

Information Systems Program

CRITICAL ROLE OF INFORMATION SYSTEMS

Information systems will play a critical role in an organization's competitive position, often making the difference between profit and loss. The Information Systems (IS) organization must respond to this challenge as well as meet demands for quality, fast response, and controlled spending.

INPUT's Information Systems Program has been operated for 10 years to provide IS managers and planners with industry intelligence to assist them in addressing these issues. This year's program emphasizes the analysis of external sources of solutions.

REPORT SERIES

Information Systems Management in the 1990s
This report analyzes technological development, business factors, and other issues that will significantly affect Information Systems management in the 1990s. Changes in expenditure patterns and organizational responsibilities are examined, particularly with reference to the management of technology deployment.

Data Base Systems Developments
Experiences with, and plans for, the use of relational and distributed DBMS are evaluated in terms of applications use, functions affected, organization units using them, and results of their use.

Application Solutions Buying Process
Approaches being used by buyers to identify, select, and acquire applications solutions (software products, turnkey systems, processing services, etc.) are researched for this report.

Customer Service Market Developments
This report examines one of the areas of most significant change, that of equipment and software maintenance and support. Trends and expenditure patterns in these functions are presented.

Personal Computer Software Developments, 1989-1994
The impact of networked systems, minicomputers, market saturation, new pricing strategies, and other key factors are analyzed.

UNIX and UNIX-related Product Developments, 1989-1994
The plans of software product developers and major organizations for the use of UNIX are analyzed. Strategies of vendors such as IBM, DEC, Sun Microsystems, and AT&T are presented.

User Requirements for Network Management
This report analyzes user requirements for netwo[rk] management. It considers methods and procedures, tools used and needed, needs for outside services, and major trends in management of digital networks.

Case Studies in Systems Integration
Vendor and user perspectives are presented in this report. Characteristics of success and failure are determined.

Project Management in Systems Integration
The role of project management capabilities in systems integration contracts is examined in this report. The role of project management technology (proprietary and public) is analyzed.

Information Services Developments, 1989-1994
This report examines changes in each information service over this period: applications software products, systems software products, turnkey systems, systems integration, professional services, processing services, and network services.

Acquisitions in the Information Services Industry
This report predicts the impact of acquisitions on [the] industry over the next 5 years. It examines the acquirors' objectives and specific programs, and the reasons acquired companies were acquired.

VENDOR INFORMATION

You have access to information in INPUT's files on over 4,000 information services vendors in U.S., Europe, and elsewhere. Hundreds of the most significant companies are profiled. Most of these companies are 'hidden' vendors—private companies or divisions of large companies.

You may select from the profiles that have been produced: use the “Hotline” service to get information when you need it.

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On-Site Visit
An INPUT consultant presents research results and industry analyses at your site. Your issues and interests are discussed together with industry trends.

Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Custom Research and Consulting projects analyze IS opportunities, user needs, user satisfaction, competitive environment, acquisition targets, etc.

- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

REPORT SERIES

- Information Systems Management in the 1990s
- Data Base Systems Developments
- Application Solutions Buying Process
- Customer Service Market Developments
- Personal Computer Software Developments, 1989-1994
- UNIX and UNIX-related Product Developments, 1989-1994
- User Requirements for Network Management
- Case Studies in Systems Integration
- Project Management in Systems Integration
- Information Services Developments, 1989-1994
- Acquisitions in the Information Services Industry

VENDOR INFORMATION

- Company Profiles
- Access to 4,000 Vendor Files
- Inquiry Service

CLIENT SUPPORT

- Access to INPUT Consultants
- “Hotline” Inquiry Service
- On-Site Visit
- Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information systems industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications services, systems/software maintenance and support).

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INPUT®

Information Services Industry

Market Analysis Program—Information Systems Module

Information Systems Module

CRITICAL ROLE OF INFORMATION SYSTEMS

Information systems play a critical role in a company's competitive position, often making the difference between company profit and loss. The Information Systems (IS) organization must respond to this challenge as well as meet demands for quality, fast response, and controlled spending.

Vendors, particularly software suppliers, must understand the factors influencing the IS organization and its interactions with users. The Information Systems Module of INPUT's Market Analysis program provides insight into these areas.

The module is designed and supported by experienced IS executives who also understand the vendor environment.

CLIENT SUPPORT

Access to INPUT Consultants
As a client to the Information Systems Module of the Market Analysis Program, you receive the special attention of INPUT's IS experts. They will interpret your marketing questions vis-a-vis IS organizations and deliver measured responses.

On-Site Visit
An INPUT consultant presents research results and analysis at your site. Your issues and interests are discussed together with industry trends.

REPORT SERIES

Information Systems Management in the 1990s
This report analyzes technological development, business factors, and other issues that will significantly affect Information Systems management in the 1990s. Changes in expenditure patterns and organizational responsibilities are examined, particularly with reference to the management of technology deployment.

The impact on vendor marketing and sales strategies are evaluated. Recommendations for action are presented, particularly with reference to organizational and strategy responses.

Data Base Systems Developments
Experiences with, and plans for, the use of relational and distributed DBMS are evaluated in terms of applications use, functions affected, organization units using them, and results of their use. The impact on software-based vendors of all types is examined. Recommendations for the effective use of such products are presented.

Application Solutions Buying Process
Approaches being used by buyers to identify, select, and acquire applications solutions (software products, turnkey systems, processing services, etc.) are researched for this report. Particular attention is paid to integration factors. Specific issues examined include standards implications, maintenance and support, user involvement, and evaluation criteria. Recommendation for making this a successful, effective process are presented.

INPUT®

Information Services Industry

Market Analysis Program—U.S.

Market Analysis Program—U.S.

INFORMATION SERVICES OPPORTUNITY

The Information Services market in the U.S. is over $90 billion in 1989 and will reach over $180 billion by 1994. The Market Analysis Program provides market intelligence and expert opinion on the developments and factors that affect your business in this dynamic, fragmented market.

MARKET ANALYSIS REPORTS

Each report contains market forecasts for 1989-1994, overall and by market component. Where appropriate industry sector and cross-industry market forecasts are included with corresponding trend analysis. Leading vendors are profiled and market shares presented. Market forces, trends, and issues are analyzed.

Applications Software Products and Turnkey Systems
Markets are forecast by target platform. Lease/purchase, maintenance, support, and pricing issues are analyzed.

System Software Products
Markets are forecast by target platform. Pricing, distribution, and marketing issues are analyzed.

Professional Services
Industry issues, such as the impact of systems integration and trends in contracting methods, are examined.

Systems Integration
Systems Integration markets are analyzed by component and by type (application, network, and data). Focus is on commercial markets, which are analyzed by industry sector.

Processing Services
Market dynamics vis-a-vis in-house vs. processing services are examined as well as the impact of distributed processing.

Network Services
Network Services markets are analyzed by application and delivery mechanism. Network management components are forecast.

INDUSTRY SECTOR/ CROSS-INDUSTRY REPORTS

Each of 15 industry sectors and 7 cross-industry functional areas are examined in this series of reports. Market specific forecasts by type of service, market share data, and profiles of leading vendors are included in each report. IS trends, industry demographics, major user issues and expenditure patterns by customer size are presented.

ISSUE STUDIES

Acquisitions in the Information Services Industry
This report predicts the impact of acquisitions on the industry structure over the next 5 years. It examines the role of specific third parties, the acquirors' objectives and specific programs, and the reasons for acquisition by acquired companies.

Personal Computer Software Products Markets, 1989-1994
Forecasts are provided by type of software, target platform, and distribution channel. The impact of networked systems, minicomputers, market saturation, new pricing strategies and other key factors are analyzed.

UNIX and UNIX-related Product Markets, 1989-1994
The plans of software product developers and major expenditures for the use of UNIX are analyzed. Strategies of vendors such as IBM, DEC, Sun Microsystems, and AT&T are considered and market forecasts provided by type of product.

User Requirements in Network Management
Analyzes user requirements for network management. It considers methods and procedures, tools used and needed, needs for outside services, and major trends in management of digital networks.

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RELATED SERVICES

- Information Services Industry Seminar—this 2-day seminar covers industry trends, issues, and forecasts.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Market Analysis Program—Europe analyzes the computer software and services markets in Europe
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

INDUSTRY SECTOR/CROSS-INDUSTRY REPORTS

- 15 Industry Sectors
- 7 Cross-Industry Functions
- Market Forecasts, 1989-1994
- Competitive Analysis
- Issue and Trend Analysis

MARKET ANALYSIS REPORTS

- 7 Major Types of Service
  - Applications Software Products
  - Systems Software Products
  - Turnkey Systems
  - Professional Services
  - Systems Integration
  - Processing Services
  - Network Services
- Market Forecasts, 1989-1994
- Competitive Analysis
- Issue and Trend Analysis

ISSUE STUDIES

- Acquisitions in the Information Services Industry
- Personal Computer Software Products Markets, 1989-1994
- User Requirements in Network Management
- UNIX and UNIX-related Product Markets, 1989-1994

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visit
- Client Conference

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INPUT®

Information Services Industry

Market Analysis Program—Europe

Market Analysis Program—Europe

PLAN FOR SUCCESS

INPUT's Market Analysis Program is a service that provides timely and accurate intelligence on the computer software and services markets, some of the fastest-moving markets in the world. How much you know about them and when you find out could spell the difference between profit and loss for your company.

USE THIS POWERFUL SERVICE

This powerful service for tracking and anticipating market trends provides the information you need, including:

- An incisive view of European information services markets.
- In-depth analysis of the dynamics of the user and competitive environments.
- Invaluable advice for vendors seeking to address or re-evaluate their strategy for market opportunities.

COUNTRY MARKETS COVERED	
France	West Germany
United Kingdom	Italy
Belgium	Netherlands
Denmark	Finland
Norway	Sweden
Switzerland	Spain
Austria	Ireland

FORECAST AND ANALYSIS REPORT

European Information Services Industry Analysis and Forecast 1989 - 1994
This report provides an analysis and five-year forecast for computer software and services markets in each European country covered.

Major industry trends, issues and growth factors are reviewed together with an analysis of successful vendor strategies, the competitive environment, and key opportunities available to industry players.

MARKET REPORTS

Professional Services
Emphasizes Systems Integration, major project contracting and the role of the sub-contractors.

Workstation Application Software
Analyses markets for applications packages in this fast-growing market. Evaluates the impact of standard operating system environments, particularly UNIX.

Electronic Information Services
This report examines the converging markets of Electronic Data Interchange (EDI), Electronic Mail and On-Line Information Services.

Turnkey System Opportunities
Examines new opportunites for turnkey systems in industry, commerce, and administration. Analyses the changing delivery modes chosen by vendors.

Software Maintenance and Support
Vendor strategies for the pricing of software support and maintenance are analysed in the context of fast-changing market and competitive conditions.

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RELATED SERVICES

- The Vendor Analysis Program provides company profiles and support data on European vendors.
- Market Analysis Program—U.S. covers the computer software and services markets in the U.S.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

FORECAST AND ANALYSIS REPORT

- Market Forecasts, 1989-1994
  - Systems Integration
  - Professional Services
  - Software Products
  - Turnkey Systems
  - Processing Services
  - Network Services
- Industry Issues and Trends
- Competitive Environment and Vendor Strategies

MARKET REPORTS

- Professional Services (Includes Systems Integration)
- Workstation Application Software
- Electronic Information Services
- Turnkey System Opportunities
- Software Maintenance and Support

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Client Conference
- On-Site Visits

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INPUT®

International Telecommunications Industry

National Network Program—U.S.

National Network Program—U.S.

TELECOMMUNICATIONS NETWORK SERVICES WILL CHANGE THE WORLD

Networks are critical to the future of government, industrial, commercial, and consumer development. Organizations can do it themselves or buy services. But what services? when? for how much? from whom? are questions that must be answered in planning telecommunications networks. The National Network Planning Program addresses these questions.

The National Network Planning Program focusses on U.S. telecommunications services. It provides information and support on vendor capabilities and offerings, as well as trends for individual telecommunications services. User needs and service opportunities are identified.

This program provides essential intelligence for network planners and managers operating U.S. networks or selling services to meet user needs.

SCOPE

MEDIA

- Voice
- Message
- Data
- Image/Video

NETWORK SERVICES

- Network Management
  - Systems
  - Software
  - Services
- Value Added Services
  - Electronic Mail Services
  - EDI Services (summarized from INPUT's EDI Program)
  - Other Services

CONTINUOUS SERVICES

Connectivity U.S.
This publication provides intelligence on developments in U.S. network services. New services (and discontinued ones), changes in laws/regulations, vendor alliances and contracts, and key events are reported with INPUT commentary.

Network Services Trends Assessments
Network services are assessed and their markets forecast through a series of publications on subjects such as network management, ISDN, VSAT, WANs, LANs, etc.

Telecommunications Services Vendor Profiles
Descriptions of the products, services, structure, marketing characteristics, operational characteristics, and financial performance of public and 'hidden' vendors (subsidiaries, private companies, etc.) are provided through vendor profiles.

NETWORK ISSUE REPORTS

Network Management—User Requirements
This report analyzes user requirements for effective network management. It considers methods and procedures, tools used and needed, needs for outside services, and major trends in management of integrated, digital networks.

Network Management—Vendor Initiatives
Vendor initiatives to meet the growing need for effective network management are presented. Major software and hardware tools available are analyzed, and tools needed to meet future requirements identified. Tools such as NetView are considered as well as the use of standalone network management facilities.

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On-Site Visit
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Telecommunications Network Conference
INPUT analyses and forecasts of network services trends are presented and discussed: client issues are discussed in group forums/working sessions.

RELATED SERVICES

- Multinational Network Program provides vendor and service data for over 40 countries.
- Electronic Data Interchange Program provides information on EDI developments and markets in North America and Europe.
- Custom Research and Consulting projects provide analysis of user needs, competitive analysis, vendor selection, partnering/acquisition services, etc.

PROGRAM DESCRIPTION

CONTINUOUS SERVICES

- *Connectivity U.S.*
- Telecommunications Services Vendor Profiles
- Network Services Trends Assessments

NETWORK ISSUE REPORTS

- Network Management—User Requirements
- Network Management—Vendor Initiatives

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visit
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INPUT®

International Telecommunications Industry

Multinational Network Program

Multinational Network Program

PROGRAM SUMMARY

Increasing competition at home and abroad is causing corporations to extend their network operations to countries throughout the world. This trend greatly adds to the difficulties of designing, implementing, and operating corporate systems and networks.

INPUT's Multinational Network Program provides information for planning and operating multinational telecommunications networks. It analyzes the complexities of multinational network design and management.

This program provides essential intelligence for network planners and managers operating on a worldwide basis.

COUNTRIES COVERED*

Africa (South)	Korea
Argentina	Kuwait
Australia	Luxembourg
Austria	Mexico
Bahrain	Netherlands, The
Belgium	New Zealand
Brazil	Norway
Canada	Panama
Chile	Philippines
China (Taiwan)	Portugal
Colombia	Puerto Rico
Denmark	Saudi Arabia
Finland	Singapore
France	Spain
Germany (West)	Sweden
Hong Kong	Switzerland
Ireland	Thailand
Israel	United Arab Emirates
Italy	United Kingdom
Japan	United States

* Representative Sample

CONTINUOUS SERVICES

Connectivity World ™
Quarterly report provides a summary of developments in multinational network services. Identifies new services, changes in regulations and tariffs, and general developments for countries throughout the world.

Handbook of International Public Data Networks
Descriptions of packet switch network services in approximately 40 countries; continually updated.

Country Service Profiles
References for information about operating regulations, restrictions, costs, and business practices in 40 countries; continually updated.

Regional Telecommunications Service Reports
Clients receive analysis and five-year projections of service requirements and trends for services in a major geographic area. Changing user requirements, national/regional development trends, and regulatory trends that could affect telecommunications planning and management are analyzed in each of five regions.

These major analyses are published periodically; once published, they are continually updated.

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Telecommunications Network Conference
INPUT analyses and forecasts are presented and discussed; sessions of specific interest to multinational clients are held.

RELATED SERVICES

- National Network Program covers U.S. telecommunications services.
- Electronic Data Interchange Program provides information on EDI developments and markets in North America and Europe.
- Custom Research and Consulting projects on particular market opportunities, national and international developments, international partners, etc.

PROGRAM DESCRIPTION

CONTINUOUS SERVICES

- *Connectivity World* ™
- Country Service Profiles
- Handbook of International Public Data Networks

REGIONAL TELECOMMUNICATIONS SERVICE REPORTS

- Asia/Pacific
- Europe
- Middle East/Africa
- North America
- Central/South America

CLIENT SUPPORT

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INPUT®

Industrie des Constructeurs de Systèmes Informatiques et de Communication

Programme 'Service Client'— Europe

Programme 'Service Client'—Europe

UNE PLANIFICATION EFFECTIVE POUR UNE PERFORMANCE EFFECTIVE

La Programme 'Service Client' d'INPUT fournit l'information détaillée concernant le service client qui vous est nécessaire pour prévoir les besoins en matiére de service, analyser les compétiteurs et traiter des challenges de la nouvelle technologie.

Vous recevez des études-proprietaires et benéficiez d'un support traitant de questions telles que:

- Quels services demandent réellement vos utilisateurs et comment pouvez-vous satisfaire leurs besoins plus efficacement?
- Que font les compétiteurs, et comment pouvez-vous y répondre?
- Quelles sont les sources de croissance du chiffre d'affaires en service pour les cinq prochaines années?
- Dans quelle mesure l'accroissement de fiabilité du matériel et de complexité du logiciel a un effet sur votre personnel-mix?
- Quelles sont les nouvelles techniques de service et comment sont-elles perçues par le marché?

VENDEURS EXAMINES	
IBM	Siemens
Olivetti	Digital
Bull	Nixdorf
Unisys	Hewlett-Packard
ICL	NCR
Wang	Amdahl
Concurrent	

RAPPORT 'ANALYSE DU SERVICE CLIENT'

Présente les resultats de 2,000 interviews d'utilisateurs de service par taille système, pays et vendeur. Le service et les fonctions de support analysés incluent les temps de réponse, les niveaux de satisfaction et les temps d'immobilisation.

PAYS EXAMINES	
Allemagne Fédérale	France
Grande-Bretagne	Italie
Belgique	Pays-Bas
Norvège	Suède
Espagna	Suisse

ETUDES DE MARCHES/RAPPORTS SPECIFIQUES

Marchés de la Maintenance Indépendante, 1989-1994
Analyse et prévision des marchés de la maintenance tierce en Europe ainsi que les profils des vendeurs et réactions des utilisateurs à la maintenance indépendante.

Tendances en Tarification 'Service Client'
Examine les perceptions utilisateur et les tendances de tarification en support matériel et logiciel-système.

Maintenance et Support du Logiciel
Examine les statégies des vendeurs en politique tarifaire et modes d'intervention; anticipe les tendances de ce marché en évolution rapide.

L'impact des Standards de Qualité de Service (SQS)
Evalue l'impact des standards de qualité BS 5750 et ISO 9000.

Les Opportunités en Maintenance 'Quatrième Partie'
Passe en revue ce marche en croissance et identifie les opportunités pour les vendeurs de maintenance.

Analyse des Revenus des Vendeurs de Service
Analyse les flux de chiffre d'affaires en vente de service et fait la prévision des zones de croissance et des opportunités.

Un rapport 'd'actualité'—a définir.

INPUT®

SUPPORT CLIENT

Accès aux Consultants INPUT
Les Clients bénéficient d'un support permanent de la part de l'encadrement et des consultant d'INPUT. Appelez-les pour obtenir leurs réactions et leur opinion.

Service d'Assistance "Hot-Line"
Le Service d'Assistance "Hot-Line" permet la réalisation de recherches 'court-terme' (nécessitant moins de doux heures) aussi bien que l'éclaircissement/l'approfondissement des eléments des rapports.

Visites sur Site
Un consultant INPUT présente les résultats des recherches et les prévisions sur l'industrie sur votre site. Vos centres d'intéret et vos problèmes sont rapprochés des tendances de l'industrie.

Newsletter Bimestrielle 'Service Client'
Les nouvelles d'actualité concernant le service client en Europe et aux U.S.A. sont publiées (ex: nouvelles politiques des vendeurs de service, nouvelles offres de service, performance des vendeurs).

SERVICES ASSOCIES

- Le Programme 'Service Client'—U.S. englobe l'industrie U.S. de la maintenance et du support, matériel et logiciel.

- Etudes 'Sur Mesure' et Projets de Consulting sur des problèmes particuliers du service client tels que satisfaction client, politique de prix, compétition etc.

Note: les études sont rédigées en anglais.

DESCRIPTION DU PROGRAMME

RAPPORT 'ANALYSE DU SERVICE CLIENT'

Contient des analyses par:
- Pays
- Vendeur
- Taille Système
  - Petits Systèmes
  - Moyens Systèmes
  - Grands Systèmes
  - Logiciel-Systèmes

Basé sur une enquête auprès de 2.000 utilisateurs de service

ETUDES DE MARCHE/RAPPORTS SPECIFIQUES

- Marchés de la Maintenance Indépendante
- Tendances en Tarification 'Service Client'
- Maintenance et Support du Logiciel
- L'impact des Standards de Qualité de Service (SQS)
- Les Opportunités en Maintenance Quatrième Partie
- Analyse des Revenus des Vendeurs de Service
- A Definir

SUPPORT CLIENT

- Accès aux Consultants INPUT
- Service d'Assistance "Hot-Line"
- Visites sur Site
- Newsletter Bimestrielle

A propos d' INPUT

INPUT fournit les informations nécessaires à la planification, des analyses et des recommendations aux directions et à l'encadrement des industries de l'informatique et de la communication. Par ses études de marché, ses anticipations de l'évolution technologique et ses analyses des compétiteurs, INPUT aide les Directions de sa Clientèle à prendre ses décisions sur une base informative.

Des services consultatifs permanents, des recherches ou du consulting spécifique, une assistance en fusion/acquisition et des études multi-clients sont proposés aux utilisateurs et aux vendeurs de services et de systèmes informatiques (progiciels, prestations matérielles, systèmes 'clés en main', intégration de systèmes, prestations intellectuelles, communication/réseaux, support et maintenance matériel/logiciel).

Une grande partie des professionels d'INPUT a plus de 20 ans d'expérience dans leur spécialité. La plupart ont occupé des postes de direction en opérationnel, marketing ou planification/développement. Cette compétence permet à INPUT de fournir des solutions pratiques à des problèmes professionels complexes.

Société privée constituée en 1974, INPUT est devenue une firme leader en recherche et consulting au plan international. Parmi ses clients, plus de 100 des plus grandes sociétés au monde et des plus avancées technologiquement.

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INPUT®

Industrie du Logiciel et des Services Informatiques

Programme 'Analyse de Marché'—Europe

Programme 'Analyse de Marché'—Europe

PLANIFICATION

Le Programme 'Analyse de Marché' d'INPUT est un service qui fournit des informations opportunes et précises sur les marchés du logiciel et des services informatiques. Ce que vous en savez et quand vous l'avez découvert peut faire la différence entre profits et pertes pour votre société.

UTILISATION DE CE PUISSANT SERVICE

Ce puissant service d'évaluation et d'anticipation des tendances du marché vous fournit l'information dont vous avez besoin, incluant:

- Une vue perspicace des marchés Européens des services informatiques.
- Une analyse en profondeur des dynamiques des utilisateurs et de l'environnement compétitif.
- Un conseil inappréciable pour les vendeurs cherchant à definir ou à réévaluer leur stratégie en termes d'opportunités de marchés.

PAYS TRAITES	
France	Allemagne Fédérale
Grande-Bretagne	Italie
Belgique	Pays-Bas
Danemark	Finlande
Norvége	Suède
Suisse	Espagne
Autriche	Irlande

RAPPORT 'ANALYSE ET PREVISION'

Analyse et Prévision de l'Industrie des Services Informatiques en Europe 1989-1994
Ce rapport fournit l'analyse et la prévision à cinq ans des marchés du logiciel et des services informatiques de chaque pays traité.

Les tendances majeures de l'industrie, les problèmes et les facteurs de croissance sont passés en revue avec une analyse des stratégies vendeurs fructueuses, de l'environnement compétitif et les opportunités-clés disponibles aux acteurs de l'industrie.

ANALYSES DE MARCHES

Prestations Intellectuelles
Insiste sur l'Intégration de Systèmes, les projets majeurs et le rôle des sous-contractants.

Logiciel Applicatif des Stations de Travail
Analyse les marchés des progiciels applicatifs sur ce créneau en croissance rapide. Evalue l'impact des environnements liés aux systèmes d'exploitation standards, particulièrement UNIX.

Services d'Echanges Electroniques d'Information
Ce rapport examine les marchés convergents de l'Electronic Data Interchange (EDI), du courrier électronique et des services d'information on-line.

Opportunités des Systèmes 'Clés en Main'
Examine les nouvelles opportunités pour les systèmes clés en main dans l'industrie, le commerce et l'administration. Analyse les modifications dans les modes d'intervention choisis par les vendeurs.

Maintenance et Support du Logiciel
Les stratégies des vendeurs en politique de prix pour le support et la maintenance sont analysés dans le contexte spécifique de ce marché changeant et des conditions de la compétition.

Note: les études son rédigées en anglais

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SUPPORT CLIENT

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Conférence
Cette conférence annuelle donne la possibilité aux clients d'INPUT de connaître les derniers développements et tendances stratégiques des points-clés de l'industrie, ainsi que de rencontrer le Staff dirigeant des autres clients d'INPUT. Un tarif réduit pour la participation à cette conférence est accordé à nos abonnés.

DESCRIPTION DU PROGRAMME

RAPPORT 'ANALYSE ET PREVISION'

- Prévisions de marché, 1989-1994
  - Intégration de Systèmes
  - Prestations Intellectuelles
  - Progiciels
  - Systèmes 'Clés en Main'
  - Prestations Matérielles
  - Réseaux

ANALYSES DE MARCHE

- Prestations Intellectuelles (Incluant l'Intégration de Systèmes)
- Logiciel Applicatif Stations de Travail
- Services d'Echanges Electroniques d'Informations
- Opportunités des systèmes 'Clés en Main'
- Support et Maintenance du Logiciel

SUPPORT CLIENT

- Accès aux Consultants INPUT
- Service d'Assistance "Hot-Line"
- Conférence
- Visites sur Site

SERVICES ASSOCIES

- Le Programme 'Analyse de l'Industrie des Services' fournit les profils ainsi que les informations sur les Sociétés de Service Européennes.
- Le Programme 'Analyse de Marché—U.S.' couvre les marchés U.S. des services et du logiciel informatiques.
- Les Etudes 'Sur Mesure' et les Projets de Consulting permettent d'analyser les opportunités de marché, les besoins utilisateurs, les compétiteurs, les projets d'acquisition etc....
- Interventions des Consultants—les consultants INPUT sont disponibles pour effectuer des présentations aux réunions de planification/développement, à des utilisateurs ou à d'autres fonctions.

A propos d' INPUT

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INPUT®

Information Systems Industry

Systems Integration Program

Systems Integration Program

THE SYSTEMS INTEGRATION OPPORTUNITY

Systems Integration (SI) is the provision of a total solution for complex information systems requiring multiple products and services. It is of strategic interest and importance to both users and vendors.

The urgency of large-scale project development requirements, the multivendor nature of engagements, the absence of acceptable off-the-shelf solutions, and the user desire for single-vendor interfaces are all contributing to the shift to the SI approach. In this approach vendors take responsibility for systems development and implementation. This can also lead to systems operations contracts.

INPUT's Systems Integration Program provides answers to the questions raised in this rapidly changing market. It is based on over 5 years of research into this area: INPUT characterized 'Systems Integration' in 1983 as "the two magic words that could change the whole information systems industry."

CONFERENCE AND SEMINARS

Systems Integration Industry Conference
This conference provides competitive and market information. Key industry trends and developments are examined. Buyer issues and opinions are presented.

Systems Integration Program Seminar
This seminar is an interactive work group session for program clients only. The results of current research are reviewed. Discussions on industry developments, market acceptance of the concept, and marketing factors are included.

MARKET ANALYSIS REPORTS

Systems Integration Market Analysis—U.S.A.
Systems Integration Market Analysis—Europe
These two reports examine Systems Integration industry trends and issues in the U.S. and Western Europe. User expenditures are forecast for the next 5 years by type of SI (application, network, data) by component (computer equipment, telecommunications equipment, software packages, professional services, and associated services) and by industry sector. Particular attention is paid to commercial opportunities: federal systems integration is covered in detail in another report. The European report contrasts experiences in Europe with those in the U.S.

Competitive Analysis of Systems Integration Vendors
This report analyzes vendors by industry sector served, annual revenues, contract size, and contract type. In-depth vendor profiles are provided. Vendor strategies and implementation approaches are analyzed, particularly sub-contract and partner relationships. The importance of various service components, such as financing and systems operations, is examined.

Case Studies in Systems Integration
Vendor and user perspectives are presented in this report. The focus is on approach selection, initial negotiations, vendor selection and contract considerations, alliances, implementation, and post-implementation relationships. Characteristics of success and failure are determined. Strategies and recommendations resulting from analysis of these case studies are presented.

Project Management in Systems Integration
The role of project management capabilities in winning and operating SI contracts is examined in this report. It analyzes user expectations of vendor project management skills. The role of project management technology (proprietary and public) in vendor offerings is analyzed.

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

Joint Client Conference
The annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

- Systems Integration Market Analysis—U.S.A.
- Systems Integration Market Analysis—Europe
- Competitive Analysis of Systems Integration Vendors
- Case Studies in Systems Integration
- Project Management in Systems Integration

SYSTEMS INTEGRATION INDUSTRY CONFERENCE

SYSTEMS INTEGRATION PROGRAM SEMINAR

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Joint Client Conference
- On-Site Visit

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information systems industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications services, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Software and Services Industry

Systems Integration Programme—Europe

Systems Integration Programme—Europe

THE SYSTEMS INTEGRATION OPPORTUNITY

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The urgency of large-scale project development requirements, the multivendor nature of engagements, the absence of acceptable off-the-shelf solutions and the user desire for single-vendor interfaces are all contributing to the shift to the SI approach. In this approach vendors take responsibility for systems development and implementation. This can also lead to systems operations contracts (facilities management).

INPUT's Systems Integration Programme provides answers to the questions raised in this rapidly changing market. It is based on over 5 years of research into this area: INPUT characterised 'Systems Integration' in 1983 as 'the two magic words that could change the whole information systems industry.'

SYSTEMS INTEGRATION PROGRAMME SEMINAR

This seminar is an interactive work group session for programme clients only. The results of current research are reviewed. Discussions on industry developments, market acceptance of the concept and marketing factors are included.

MARKET ANALYSIS REPORTS

Systems Integration Market Analysis—Europe
Systems Integration Market Analysis—U.S.A.
These two reports examine Systems Integration industry trends and issues in Western Europe and the U.S. User expenditures are forecast for the next 5 years by component, equipment, software packages, professional services and associated services and by industry sector. Particular attention is paid to commercial opportunities.

Competitive Analysis of Systems Integration Vendors
This report analyses vendors by industry sector served, annual revenues, contract size and contract type. In-depth vendor profiles are provided. Vendor strategies and implementation approaches are analysed, particularly subcontract and partner relationships. The importance of various service components, such as financing and systems operations, is examined.

Systems Operations in the SI Market
Systems operations (facilities management) is becoming an increasingly significant service sector often closely associated with the development of complex large-scale systems integration developments. This report examines this developing opportunity, its competitive dynamics and its strategic significance.

Project Management in Systems Integration
The role of project management capabilities in winning and operating SI contracts is examined in this report. It analyses user expectations of vendor project management skills. The role of project management technology (proprietary and public) in vendor offerings is also analysed.

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RELATED SERVICES

- Market Analysis Programme analyzes the computer/communications software and services markets in Europe and the U.S.
- Vendor Analysis Programme provides company profiles and support data on information services vendors in Europe and North America.
- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups or other functions.

PROGRAMME DESCRIPTION

MARKET ANALYSIS REPORTS

- Systems Integration Market Analysis—Europe
- Systems Integration Market Analysis—U.S.A.
- Competitive Analysis of Systems Integration Vendors
- Systems Operations in the S.I. Market
- Project Management in Systems Integration

SYSTEMS INTEGRATION PROGRAMME SEMINAR

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- Joint Client Conference
- On-Site Visit

About INPUT

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Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

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INPUT®

Information Services Industry

Vendor Analysis Program—U.S.

Vendor Analysis Program—U.S.

GUIDE TO A FRAGMENTED INDUSTRY

The Information Services industry is highly fragmented. It is also intensely competitive and has a rapidly changing market structure. Participating in this industry requires access to information and knowledge on vendors and their characteristics. Through the Vendor Analysis Program, clients are able to satisfy this need.

The Vendor Analysis Program is based on INPUT's 14 years of tracking vendors in the information services industry. It provides access to files on thousands of vendors and detailed profiles on hundreds of the most important companies.

Information from the Vendor Analysis Program is critical for competitive analysis and purchase, acquisition, and alliance decisions.

VENDOR PROFILES

Profiles of public and private information services vendors are the cornerstone of the Vendor Analysis Program. Profiles focus on 'hidden' vendors: divisions of large companies, private companies, and small fast-growing vendors. They include:

- General information (company name, address, telephone, chief executive's name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- Financial data, where available
- Revenue distribution by delivery mode
- Employee and organization data
- Key products and services
- Industry markets served
- Geographic markets served

TYPES OF VENDOR COVERED

- Professional Services
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations (FM)
- Systems Integration
  - Commercial
  - Federal Government
- Applications Software Products
  - Vertical Industry Specific
  - Cross-Industry
- Systems Software Products
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools
- Processing Services
  - Transaction Services
  - Utility Services
  - Systems Operations (FM)
  - Other Processing Services
- Network Services
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information (Data Base) Services
- Telecommunications Services
- Turnkey Systems
  - Vertical Industry Specific
  - Cross-Industry
- Third-Party Maintenance

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"Hotline" Inquiry Service
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Access to Files on 4,000 Vendors
INPUT maintains files on over 4,000 information services vendors. Access is through the "Hotline" or by visiting the Mountain View information center.

Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Vendor Analysis Program—Europe provides company profiles and support data on European information services vendors.
- Market Analysis Program analyzes and forecasts the computer/communications software and services markets in the U.S. and Western Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

VENDOR PROFILES

- Information Services Vendors
  - Public Companies
  - Private Companies
  - Divisions of Large Companies
- U.S. and Canada
- Company Background
- Products and Services
- Revenue and Employee Data

CLIENT SUPPORT

- Access to INPUT Consultants
- Access to Files on 4,000 Vendors
- "Hotline" Inquiry Service
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Information Services Industry

Vendor Analysis Programme—Europe

Vendor Analysis Programme—Europe

GUIDE TO A FRAGMENTED INDUSTRY

The Information Services industry is highly fragmented. It is also intensely competitive and has a rapidly changing market structure. Participating in this industry requires access to information and knowledge on vendors and their characteristics. Through the Vendor Analysis Programme, clients are able to satisfy this need.

The Vendor Analysis Programme is based on INPUT's 14 years of tracking vendors in the information services industry. It provides access to files on thousands of vendors and detailed profiles on hundreds of the most important companies.

Information from the Vendor Analysis Programme is critical for competitive analysis and purchase, acquisition, and alliance decisions.

VENDOR PROFILES

Profiles of public and private information services vendors are the cornerstone of the Vendor Analysis Programme. Profiles focus on 'hidden' vendors: divisions of large companies, private companies and small, fast-growing vendors. They include:

- General information (company name, address, telephone, chief executive's name, public/private status, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- Financial data, where available
- Revenue distribution by delivery mode
- Employee and organisation data
- Key products and services
- Industry markets served
- Geographic markets served

TYPES OF VENDOR COVERED

- Professional Services
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations (FM)
- Systems Integration
- Applications Software Products
  - Vertical Industry Specific
  - Cross-Industry
- Systems Software Products
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools
- Processing Services Vendors
  - Transaction Services
  - Utility Services
  - Systems Operations (FM)
  - Other Processing Services
- Network Services
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information (Database) Services
- Telecommunications Services
- Turnkey Systems
  - Vertical Industry Specific
  - Cross-Industry
- Third-Party Maintenance

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of profile data.

Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as meet senior staff from other INPUT clients.

DIRECTORY OF INFORMATION SERVICES VENDORS

Directory of approximately 400 European information services vendors along with summary data. Indexed by country market served and mode of services offered.

RELATED SERVICES

- The Vendor Analysis Programme—U.S. provides company profiles and support data on U.S. and Canadian vendors.
- Market Analysis Programmes analyse and forecast the computer software and services markets in the U.S. and Europe.
- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups or other functions.

PROGRAMME DESCRIPTION

VENDOR PROFILES

- Information Services Vendors
  - Public Companies
  - Private Companies
  - Divisions of Large Companies
- Western Europe
- Company Background
- Revenue and Employee Data
- Products and Services

VENDOR DIRECTORY

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information systems industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications services, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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1989 MATERIAL

SUPPORT NUMBERS

INPUT®
EDI Reporter
INTERNATIONAL

A Monthly Publication from INPUT's **EDI Planning Service**

Vol. 4 No. 3 March 1989

IN THIS ISSUE:

Hank Lavery Joins Ordernet

As reported here last month, Hank Lavery had been in negotiations with a leading EDI service and **the former TranSettlements' President joining Sterling Software (SSW) Ordernet Services as Vice President of Transportation Products.**

The newly created position is chartered to bring new transportation functionality to existing and prospective EDI customers via Ordernet. Lavery will also target transportation carriers as trading partners for current Ordernet customers and others.

According to **Ordernet President William Plumb**, Lavery is "the best" person for the job because of his involvement in numerous EDI committees and as a speaker on EDI worldwide. "Hank's personal visibility and background immediately enhances Ordernet's reputation for having the strongest and most credible organization in the world of EDI" said Plumb.

This means that the Lavery Group formed when he left TranSettlements will be shuttered. Prior to joining the Atlanta-based TranSettlements, Lavery worked with major transportation, accounting, and computer firms. He's been active in virtually all transportation-related industry associations.

VIP at SSW

In the past, SSW has generally focused on grocery, drugs, medical/surgical, retail, and hard goods. While Lavery's joining SSW signals a branching strategy into transportation

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Hank Lavery...*from page 1*

and logistics, the company is not standing still in other areas. Recognizing that perhaps the biggest impediment to accepting EDI is user training, **SSW has newly formalized a professional service methodology called the Vendor Implementation Program** (VIP) which incorporates six major steps:

- Assisting "hub" companies in a trading group to develop a realistic EDI plan and schedule
- Providing direct marketing and implementation support to targeted trading partners
- Developing a cost-effective EDI equipment and software recommendation
- Providing educational and marketing seminars for targeted partners
- Continuing follow-up and support to facilitate trading partner implementation
- Providing status reports to management to measure project success

Part of this process is a needs assessment throughout the trading cluster; enhancement of existing applications to generate electronic EDI transactions, and to make them able to accept EDI; and assistance in automating manual processes.

Ordernet has also provided professional services to a major transportation company to integrate its EDI functions with bar code-based and other applications, and to recruit additional EDI trading partners.

Phyllis Sokol's Book

While not officially an Ordernet product, one of the company's key employees, Phyllis Sokol (who heads the VIP program), has written the first hard cover on EDI. Called ***EDI- The Competitive Edge*** (McGraw-Hill/ Intertext), the volume suffers slightly in that it appears the publisher rushed into press with a draft version of the manuscript. There are some glaring syntax and grammatical errors. Nevertheless, the book is well worth the small price of admission for its case studies and the valuable work sheets covering cost analysis and the EDI feasibility study.

Sokol has been running EDI implementation workshops through the prestigious American Management Association and the book is largely based on this course. She told us about her approach in the book, saying that, "The first five chapters handle the basic issues that you have to know in EDI: what's involved, are you ready, questions about trading partners and so on. It's handled from a business point of view. **It's not a technical treatment because it's for the functional manager.**

"The next three chapters deal with three specific industries: health care because they chose proprietary standards and I thought that was interesting; automotive because of the pressure manufacturers are placing on their vendors and because of how they expect to place EDI in throughout their entire corporation; and third, the retail industry because of its various segments: grocery which has industry specific standards for many transactions, and which is just starting EDI direct store delivery, and the retail segments where you have large retailers developing corporate EDI strategies impacting their vendors."

EDI - The Competitive Edge is available for $25 from EDI Spread the Word (214-243-3456), and will likely be sold through mass market bookstores and perhaps as the business book of the month club selection. (EDI Spread the Word also has other titles available.)

Transactions Become Data Bases

One more bit of news from Sterling Software. Ordernet has been the only EDI service provider to use EDI transactions (as well as electronically submitted sales reports) to create a data base useful for market analysis and other purposes. Used in the heathcare area, customers agree to have their data collected and there are a number of safeguards in the methodology to protect privacy and guard against industrial spying.

Now Ordernet has indicated plans to be more aggressive in this area, and presumedly in providing other data bases linked to EDI functions. **Robert O' Malley**, formerly with CompuServe, has joined SSW Ordernet as Director of its data base products unit. ■

Analysis: Digital Equipment Corporation—"Where's the Beef?"

At the December EDIA/ TDCC show, Digital Equipment Corporation (Digital) was highly visible in part due to the keynote address delivered by one of its executives. Also, **the company made several announcements—not of products, as we had hoped, but of intent**.

Competitors were quick to jump on these announcements with one saying, "Where's the Beef?" This competitor pointed out that although announcing intent may be good marketing, no U.S. EDI products are yet available from Digital. The VAX/EDI software, released last year in Europe, has not been "let out of the bag" domestically, and Digital officials could not suggest a timetable for its availability. However, one manager told us that the company is working on the U.S. version diligently, and indicated that the company will release no product before its time. The development process has been delayed because the company wants to release a full featured product supporting X.400 communications capabilities.

No U.S. VAN Services

Nevertheless, the "statements of intent" are powerful, coming as they do from a leading equipment supplier and systems integrator. First, Digital announced it *will* provide EDI software and professional services worldwide. DEC Office Information Systems Group manager Gene Hodges told INPUT that "**Digital does not intend to get into VAN services in the broad sense.**" This should put to rest speculation that Digital might offer network services using its fiber-optic backbone corporate network.

The company does, however, build private networks. For example, **it designed the MCI Mail network and is also jointly developing an E-mail service with Pacific Bell**. Further, it offers network services such as the DEC Store (which optionally supports EDI purchasing) and has some remote computing services for pre-installation testing and other purposes. But that's about it, at least in the U.S. Europe is a different story. Hodges said that the company's U.K. VAN was launched to take advantage of the Financial Services Act which allowed Digital to participate in the "big bang" of open stock market trading. This VAN is also a visible demonstration of Digital's corporate networking capabilities.

In other statements of intent, Digital said the company would support EDIFACT and X12, would support the international Open Systems Interconnect (OSI) model X.400 messaging standard, would work closely with VANS and business application suppliers, and most importantly from a software perspective, would provide application programming interface (API) specifications to support EDI integration development worldwide.

Enterprise Services

Digital's strong suit appears to be in the professional services arena and in working as a prime contractor in network intensive, systems integration projects. This, in fact, was a direction announced at last year's DECWorld. Termed "Enterprise Services" the approach calls for working with others on complicated projects.

Hodges said that his company sees some fundamental "sea changes" in the way companies communicate between themselves, and EDI is just one of these changes. The greatest demand for "Enterprise Services" is coming from multinational corporations, and in Europe, demand is in anticipation of the 1992 creation of a European state.

In Digital's view, **EDI and Enterprise Systems go beyond intercompany communications. Enterprises can be thought of as units within the same company.** Distributing and managing intracompany electronic documents can be as important as those flowing between companies. The Digital approach calls for integrating several capabilities, such as E-mail and compound document exchanges with EDI.

Digital points to its own EDI implementation as one of its more important credentials. In his speech at the TDCC/EDIA conference Winston Hindle, Jr., Senior Vice President of Corporate Operations reported that EDI has reduced the cost of a purchase order at one Digital plant from $125 to $32, and has cut the purchase order processing time from five weeks to three days. As part of its training and education effort, the company

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DEC *. . . from page 3*

has published one of its glossy books covering the subject. Called *Executive Summary on Electronic Data Interchange*, the 80-page volume covers the basics of standards and implementation issues and offers a useful EDI action plan.

The Digital EDI message seems elusive. This is not to say that the company cannot deliver an EDI solution as part of its suite of solutions, or by working with other software vendors. Also the "Enterprise Systems" approach, only slightly different from IBM's Inter-Organizational Systems spin on EDI may put EDI over the heads of practical managers who just want the solution to their business problem and who don't fall for the almost academic concepts being promoted. ■

NACHA Proposes Changes to CTX

There are basically three EDI/EFT formats, transactions which move value with information that can be used by an EDI system: Cash Concentration plus Disbursement with Addendum (CCD+), Corporate Trade Payments (CTP), and Corporate Trade Exchange (CTX). Of these, only CTX permits multiple invoices to be covered with a free-form, variable length addendum.

CCD+ has been used in the Federal Government's Vendor Express program. CTP hasn't been used much at all. CTX is of most interest. But, there have been problems, which the nation's largest electronic payment network, the National Automated Clearing House Association (NACHA) has now addressed.

NACHA did a review of CTX and is recommending changes to strengthen use of the X12 format. "This enhancement will provide significant incentive for acceptance of the ACH for EDI payment" said G.R. Bielfeld, Manager of EDI for R.J. Reynolds Tobacco.

The transaction will now include the ISA/IEA and CS/GE envelopes, providing greater flexibility within the X12 standard. NACHA hopes to have the proposal approved by its board of directors before the Annual Conference in April.

Meanwhile, the association has formed an **EDI council** to address EDI activities within the industry. **We've been privy to some plans in the banking sector, and we suspect this area will be heating up over the next few months.** ■

TranSettlements' Approach to Interconnection; E-Mail Providers in Aerospace Internetwork Demo

Interconnection has been an almost emotional issue with users who want to be able to exchange EDI data with their trading partners no matter what network is being used. Late last year, there were a flurry of announcements as the EDI networks revised their approaches by dropping internetworking charges.

TranSettlements has apparently gone one step further by announcing it will not charge anything for interconnection. "There are no fees, penalties, or premiums charged for internetwork transmissions to TranSettlements network users," says Joe Tenny, Network General Manager, adding, "There is no double-charging for gateway service through a second network nor any hidden monthly charges for this interconnection. Network usage charges will be the same as if the interconnected trading partner was a participant in only one network. In other words, the charge for going through two networks to a trading partner is the same as the charge for going through only the TranSettlements network."

Meanwhile in response to pressure from the **Aerospace Industries Association Information Technology Committee**, electronic mail providers have demonstrated interconnection using the X.400 message handling system. Participants in the demonstration include many who are also offering EDI network services: AT&T Mail, GE QuikComm, McDonnell Douglas OnTyme, Western Union Easylink, Telenet's Telemail, plus Dialcom. The demonstration has set the stage for a 6-month pilot program within the aerospace industry in preparation for commercial interconnection services under X.400. ■

EDI Reporter 1987 Index

January: TDCC/EDIA conference announcements: CDC software, MSA/Transettlements/GEIS agreement, IBM distributes software, Ordernet expands X12 services, new software companies. Compat '86 report. INPUT European EDI Market Opportunities Report issued. Interview: Western Union. Bits: Telecom Canada/Trade Route, IBM's Shipnet.

February: CDC staying in EDI. Feature: Mainframe Integration (Interview with MSA/GEIS). Bits: Sterling Software/DCA agreement, GEIS/Distribu*Net agreement, GE/ICL form INS.

March: MDC and BT end UK joint venture. X12 Meeting. GEIS User Group meeting. Needed: Detailed EDI billing. Productivity and EDI. DNS Interview. Update on last issue.

April: Tax Time and EDI (paperless filing), Kleinschmidt sold to management. Case Study: Kodak. Bits: U.K.'s Shipnet/Dish, GEIS Negotiating in Europe, "Winenet." Fishnet debuts from Fulton Information Services (April Fool!).

May: RBOCs and EDI (Ameritech/GFI). Credit Research Foundation conference. RJ York and Associates.

June: Interview: ACS, Inc.. INPUT's EDI Services Report forecasts $1.9 billion in 1992. Value Added Data Services in Europe Report issued. Bits: Sterling's EDI/LaserMail, GEIS has 700, ADP, Istel and Systems Designers.

July (**Bonus Issue**): Telenet hints announcement at INPUT conference, software panel added. Bits: CompuServe announcement expected, GEIS at 1,000, (**Regular Issue**): X12 meeting. "Electronic Cocaine" - Ordernet User's meeting. UCS meeting - a merger with X12? Bits: IBM/Fiat venture, Vanguard program, Edict.

August: Telenet/Ordernet Announcement at INPUT conference. Interview: Sterling Software (Ordernet). NITL Conference on International EDI. UNJEDI Meeting. Bits: BOC to sign resale agreement, MSA's EDI Expert released, military commissaries using UCS, Arthur Anderson sees wholesale distribution restructuring, IBM clones IVANS in UK, EDICON, Vanguard.

September: Paul Olson resigns EDI*Net. X12 meeting. Interview: Builder's Square. INPUT's Software Reports issued. Bits: Tax reform act of 1986, 25 cent stamp and EDI, Western Union EDI Service in Beta, Phyllis Sokol joins Sterling, APL Group moves, adds staff, Bobbin Show Announcements (Design*Express, ACS), SITPRO software, GM signs with Edict. EDI Stats: Top X12 software providers.

October: Interview: TranSettlements. EDI Conferences planned. EDI Book Reviews. TranSettlements unbundles. GEIS News: Microdynamics agreement, UPC/barcode support. Bits: GEIS/ISI-Dentsu agreement, EDI, Inc. new software.

November: BOCs and EDI (Ameritech, iNet America). Videotex and EDI (SchweberNet, Videolog, WSSDOM, Design*Express, Electronic Forms). EDI in Canada (Telecom Canada interview). CompuServe and the EDI Nation (interview). New GEIS pricing. EDI*T Version 2.3 released. Bits: GEIS wins CEFIC, EDICT endorsed, Istel survey. Agencies and Associations in EDI.

December: It's TEDI from Telenet. Interview: Telenet. EMA Conference. E-mail and EDI Integration. X12 Meeting.

EDI Reporter 1988 Index

January: Father of EDI Fired? Jerry Dreyer heads TDCC. TDCC/EDIA 19th Forum. Transnet interview. Essay: EDI and E-Mail Integration. UCS Wins WINS and VICS. Bits: Weiss joins Western Union. GSA selects Martin Marietta. GEIS' EDI*T. Supply Tech and Control Data. International Bits: GE and Transtema. GEIS and MSA in Europe. EDI in the UK. IBM Europe users group. Computer Law and EDI studied.

February: Crowntek bows out, Ordernet takes over. AT&T and Levi-Strauss. McCormack & Dodge and GE IS. International EDI - 147% Growth. EDI in Japan. Ordernet - up 45%. EDI and X.400 seminar. BCG, ISI - "DEC-Mates." Bits: GE IS offers implementation services. ACS Network Systems expands interface. SGML proposed as FIPS. International Bits: COST 306. ODETTE goes to EDIFACT. EDIFACT Board formed. SITPRO's new SPEX release. Letters: Supply Tech.

March: Customs, others, back EDIFACT. Crowntek management buyout. Federal EDI - $196 million by 1992. EDI at First Chicago. Interview: ISI - targeting bank EDI. APL's Rhein says "No need for paper." Bits: Ed Guilbert's consultancy. Compuserve's EDI available. Pansophic recommends ACS. IBM and Quick Response Systems co-market UPC catalog. IBM applies MAP to EDI. GE IS signs Cam/Am Tech as agent. Ordernet introduces 9600 bps dialup, new staffers. ABC named to INC magazine's 500 best companies. Southern Pacific enhances SP Liberator software. International Bits: IBM and Copenhagen Telephone form danNet. GE IS to announce link between US and UK. NCITD plans international EDI session.

April: X12 Dallas meeting. Canadian trade EDI project (CANSIF). Harvard EDI - Interview with Benn Konsynski. GE IS Links to INS. Legal Beagles look at EDI. IBM Buys SNET (April Fool!) April Fool's EDI Glossary. Bits: GE IS names Niels Nielsen. Hank Lavery elevated at Transettlements. IBM applies IMAP to EDI. Reorganization at McDonnell Douglas. International Bits: EDIFACT Rapporteurs plan Japan trip. GE IS working with NEC on Trade*VAN, and with ISI on Shipping EDI. Syntra adds EDI to software. Cap Gemini Sogeti subsidiary targets EDI.

May: DISA show in San Francisco. DEC "Very Serious" about EDI. EDI and X.400 - EMA event report. Interview: Union Pacific Technologies. INPUT conference planned. Bits: Dave Foster leaves GE IS, Sue Cole replaces. AMS/INS consolidates in Ohio. EDI Yellow Pages out. International

EDI Reporter 1988 Index (Continued)

Bits: CNCP plans EDI announcement. Austria's ECODEX starts up. Letters: Congrads from SSW, letter from Yugoslavia. Minitorial: Beware the "continuation notice."

June: Come (Back) to SF - INPUT's Conference. Apple Applies EDI. CNCP offers Canadian EDI, signs APL Group. GE IS' Tony Craig - "EDI No Panacea." Interview: Data Designs Associates. Internetworking. Ask Mr. EDI - Edi a religion? Bits: Corporate Software uses EDI ordering. Ordernet releases EDI/FAX and EDI/LaserMail. IBM MAP participants listed. International Bits: GE IS Italy reported in negotiations to sell equity to PTT. ODETTE looking at CAD/CAM interchange. New Zealand forms EDI Council. Australasian EDI market sized.

July: AT&T Back in EDI. CNCP - In and Out? EDIFACT Delegation to Far East - Jeff Sturrock Interview. IBM wins Reinsurance Network. EDI Case Studies released by INPUT. EDI in Government Conference report. GE IS Aces ACES Port project. Harbinger's InTouch*EDI. Lawyers confer on EDI. EDI Leadership Awards from Ordernet. Ask Mr. EDI: Illegal EDI? Bits: Office Product prices, paper costs rising. Supply Tech forms consulting service. GE IS says "don't call us GEISCO!" ICC clarifies regulations for EDI Bill of Lading. Sears Communications Network supports VICS. Ted Myer heading interim look at EDI and X.400. International Bits: ANSI X12 IPT proposes changes to IFTM. SEAGHA port system up. SD buys SCICON, sells IBM's EDILink. IBM expands MAP program to Europe. Worldwide EDI Yellow Pages coming.

August: EDI Reporter in Japan. GE IS drops interconnection charges. DEC Announcement? GE IS releases EDI*Central. EDIA adds members, hires lawyers. EDI Awareness Jumps. Ask Mr. EDI - What is IVANS? Bits: Call for papers from EDI Forum. TranSettlements says MMDS will distribute software; refer sales to ACS; adds support for Tandem and Stratus; adds PC package from Shell Oil. Pacific Bell Connection has hidden EDI capability. ATA Services updates TRANSPRO software. Compuserve eliminates monthly minimums. International Bits: Syntra adds EDI. Customs moves up EDI at Kennedy Airport.

September: New INPUT forecast. AT&T EDI - Interview with Gary Dalton. Ordernet Eases Translation. INPUT's Intertrends Conference - the magic moon over the Bay. CNCP's EDI Progressing. EDI Versus the Sales Staff. EMA heads to Boston. Ask Mr. EDI - Neutrino EDI. Bits: TranSettlements closes regional offices, focuses on core business. GE IS' interconnect policy. GE IS tests Quik-Comm to FAX. IVANS adds Sears Communications Network access. Metro-Mark introduces DOS/VSE version. EDS of Canada offers EDI*Asset PC software. Ed Guilbert/Paul Lemme alliance. TDCC/EDIA forms users group. MMDS markets EDI services. International Bits: EDIMAX professional services consortium formed. ISTEL has 550. Montedison offers EDI software. New Zealand EDI seminar attracts 230.

October: EDI Software market. ADP Reveals EDI Philosophy. Craig out at GE IS. ACS new release. Ordernet offers ACS software, signs with Global. Hong Kong EDI - A Step Back. International Project Team meeting. TDCC/EDIA 20th forum set. Ask Mr. EDI - Bumper Stickers. ANSI X12 Meeting report. Rebecca Edi Wheatman born. EDI Stats: cost of paper versus EDI. Bits: EDI Software company buy-out pending. Telenet signs GTE units. Control Data adds hardcopy, Fax, claims 1,000+ users. ABC offers professional services. Changes coming to TDCC 214 transaction. ATA directory available. Frank Bridge joins APL Group. International Bits: EDIFACT releases IFTM. Missing: Pacific Rim representatives. Japan MITI forms EDI council. NTT joins in EDI-like network for gift industry. Japan Passnet VAN developing. Bundespost and France Telecom promote EDI. COST 306 in trial. Cable and Wireless buys Export Network. EDICON for UK construction industry formed.

November: TranSettlement's Transformation. INPUT profiles 39 EDI networks. Toronto Dominion Bank's EDI. AT&T's Building Blocks. Supply Tech's EDI/Graphics. Chrysler targets June for complete EDI. How big a market - really? Soviet's launch EDIFLOT. Mr. EDI: The Ballad of EDI. EDI Stats: EDI Status. Bits: Joe Bass to Foretell. Canadian Graphic Scanning affiliate offering EDI. Tony Craig's new job. Ed Shaw joins APL Group. EMA looking at legal EDI. CDC FAX/Hardcopy pricing. ADP's EDI 2000 software. International Bits: UN/EDIFACT. McGinnis moving to Holland. Asian coordinators to EDIFACT. Customs Service EDI seminar. International EDI Users conference planned. INS installs new processors. Shipman Japanese VAN.

December: X.400 and EDI. X12 meets in LA. ABC Bought by T and B Computing. Ordernet enhances GENTRAN. Harbinger gets Southern California Edison. Norway's EDI hits red tape. McDonnell Douglas considers EDI*Net "Family Jewels". CDC, CEDEX address container EDI. McKesson's satellite EDI. Ask Mr. EDI: Apocalypse*EDI (1999). Bits: Sears holding supplier meetings on EDI. IBM's SID offers expEDIte. MSA adds IBM interface. Merit Systems introduces XWAY. Data Dispatch Corporation sells Railinc software. American Custom Software adds motor support. TDCC/EDIA adds two. BC Rail selects DNS. Federal EDI: shipping and IRS. Telenet contracts. Vickie Fleet to Redinet. International Bits: Nichole Willenz heads North American EDIFACT effort. Singapore on line. INS and EDICT link. DEC's VAX/EDI adds interfaces. DEC recruits in Europe. Perwill releases PC version.

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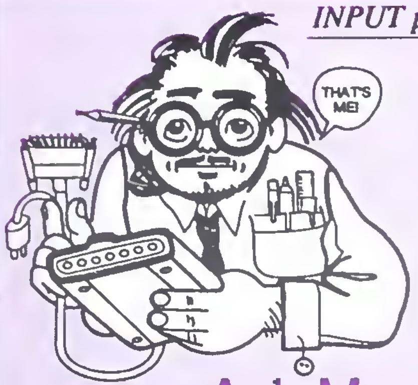


Ask Mr. EDI

Dear Mr. EDI,

How can I be sure that my EDI data will be safe in the event of a nuclear attack? (By the way, my auditor asked me this question and I knew you'd have an answer.)

- Nicholle ("Nuke") Will-ends, Los Alamos, New Mexico

Dear Nuke,

First of all, thank you for your vote of confidence. I'm certain I can help. I believe your auditor may be concerned about the **electro-magnetic pulse** (EMP) which nuclear physicists theorize will be caused by "the bomb." Under this scenario, a pulse of high power nutrinos will basically wipe out all magnetically stored data on the earth, including that archived on computer tapes and hidden away in deep mountain vaults. Even the magnetic strip on the back of your credit cards will not be safe.

You should know that the EMP effect is not only caused by a nuclear explosion. Your data is probably being erased right now as the result of pulsars billions and billions of light years away. Even though they are very distant, their beams of highly-charged subatomic particles are slowly wiping out data banks all over the cosmos.

But back to your question. One way to protect your data in case of World War III is to use CD ROM storage. The only problem with this idea is that there are no guarantees the technology needed to read the disks will survive the holocaust.

If it's really important to you and your auditor, I suggest you plan to print out all your EDI data in regular intervals, say every few hours or so, and file it away in shoeboxes. Afterall, papyrus codices have survived from Babylonian times. Surely if you make certain to use high quality, low acid bond paper, and label the shoeboxes carefully, your paper records should stay auditable for a millennium.

Your questions to Mr. EDI are welcome.

Graphnet Looking at EDI

We earlier reported that FNC, an agent in Canada was reselling Graphnet, and is working with EXTEL, the parent firm of Foretell Corporation, which sells EDI software. Greg Gallagher, Graphnet's Marketing Director, confirmed this report and told us that **Graphnet's current product line is suited for generic EDI,** although they have no EDI specific services such as translation or message verification.

Graphnet hopes, before the end of the second quarter, to allocate staff resources and budget to address the EDI opportunity. The company is currently providing messaging services to financial firms which may carry over to EDI. One of these is a service called Intelligent Telex which reformats certain documents into standardized formats. This service is being installed at several banks.

Gallagher told us that Graphnet is very sales driven, using a direct sales force rather than other methods such as advertising or trade shows. He said Graphnet has a value-added orientation, customizing its services to customer needs. While its EDI approach may be generic in the beginning, later the company will add value-added services responding to user requirements. ■

ISTEL's Franchise Approach

In last month's interview with Istel's Director of Business Development, EDI Services Division, Phil Coathup hinted of interesting things to come. Well, they're happening.

Coathup notes that the company set up a task force to define the needs of the international marketplace and developed a strategy to offer EDICT (ISTEL's EDI service in the U.K.) as an international service. Called "the franchise approach," the strategy is seen as a means of enabling companies worldwide to use EDICT software, and to also access the consulting expertise within the ISTEL organization.

Apparently jumping the gun on a commissioned Coopers & Lybrand study on a project called TradeLink, Cable and Wireless Hong Kong (CWHK) has licensed ISTEL's EDICT software for a service to be launched as early as next month. Access from the U.K. to the Hong Kong service will be through the Cable and Wireless Mercury network. (For more on the situation in Hong Kong, see our interview with Keith Parr of CWHK in our January issue).

Csironet, a wholly-owned subsidiary of Paxus Corporation Ltd., an Australian firm, is establishing the National Trade Services network (called **Nationtrade**) for Australia's import/export community. Nationtrade is based on EDICT.

An Post, the Irish Post Office, has agreed to franchise EDICT as a service through ISTEL's Dublin node, with processing to be done at ISTEL's Redditch data center.

Coathup says that more "franchises" are expected. ■

MCI Mail's Hybrid EDI

Two months ago, we reported in News Bits our discovery of an EDI capability within MCI Mail. We were curious as to why this hidden capability had not been promoted, and if MCI planned to capitalize on growing awareness of EDI through this offering.

The *EDI Reporter* spoke to **Doug Brackbill, Senior Marketing Manager of MCI Mail**. He told us that the E-mail "Scripts" capability, which allows users to design electronic templates such as order entry forms, can specify the format of the data output. What results is a hybrid service which combines interactive order entry with X12 output.

So how many companies are using this hybrid EDI? Brackbill was noncommittal but said, "We have seen applications up and running on that, but its hard to say how many." Also, MCI Mail doesn't go into a customer's business that way.

A "Script" is prepared using dBase II programming language off-line; the results are then uploaded for testing. When they're satisfied it works, customers then "publish" the script (which can incorporate branching logic) and control who can use it. The envelope is addressed already, so the messages' destination is predetermined. And, delivery can be via E-mail, FAX, hardcopy, or Telex.

We asked Doug Brackbill **why MCI doesn't highlight this capability more and benefit from growing EDI interest**. He said the company only promotes it through the direct sales force and its agents who can sell a customized solution for specific requirements.

Brackbill said that MCI also does other EDI types of things, such as an **intelligent Telex** offering called **Automated Money Transfer Service**. This uses artificial intelligence to evaluate unformatted telex messages, and then sends formatted payment instructions into a subscribing bank's system. It's being used by Irving Trust (New York) and Chase Manhattan Bank. INPUT believes the service is based on technology developed by RCA Global Communications, which MCI acquired from GE in 1987.

Regarding MCI Mail's current capabilities in true EDI, Brackbill said that the network is capable of handling all types of messages including binary files, so it can act as a transport mechanism for EDI.

As for an increased emphasis on true EDI by MCI Mail, Brackbill was noncommittal but did say, "It's an area of interest." ■

GE IS Sells EMC*Express Medical Claims Service

General Electric Information Services (GE IS) has sold off its EMC*Express electronic medical claims business to GTE Information Services (GTEIS). The move caused rumors that the entire GE IS organization was being sold to GTEIS - not so. Terms were not disclosed. INPUT believes EMC*Express received less than $500,000 in revenues last year. The unit had approximately 12 dedicated staffers. EMC is a version of EDI applied to medical claims, using formats known as HCFA 1500 and UB82.

"GTE will continue supporting customers of EMC*Express and plans to offer additional products and services to the healthcare community" said Robert Pelstring, President of GTE Health Systems.

GE IS was basically selling physicians electronic access into the National Electronic Information Corporation's (NEIC) claims clearinghouse. **It was a tough sell.** Physician's, by and large, saw little benefit in improving their cash flow by quicker medical claims turn-around. This past year, GE IS tried enhancing the service with an electronic dunning service called Collect*Express. The two services now become part of GTEIS' Gateway*Express services.

GTEIS' motivation in the buy is to further its moves into the health information systems and services area. The company has won several state contracts for medical claims processing. Insiders say an equipment and software development deal, possibly involving one or several of the RBOCs, is being discussed. GTEIS will have to overcome some history with the powerful American Medical Association. There was a trading of lawsuits several years ago regarding the marketing of E-mail and on-line data base services through Telenet for the medical profession.

Meanwhile GE IS is not left in the cold. Under terms of the contract, the now sold EMC*Express will continue to use the GE IS network for several years. ■

SEGIN Group Proposes Pelican File Transfer Protocol for EDI

During a recent seminar organized by the French software firm, the Segin Group, for over 40 of its clients, INPUT's Tim Stevens shared the podium with Pierre Lepars of the Group's Network Services division. The conference was held at the Chateau d'Esclimont, northwest of Paris, a location described by Tim as "superb."

During his presentation, M. Lepers gave the accepted definition of EDI as the transfer of structured data by means of agreed messages between the applications of different computers. He said that essentially, EDI consists of extracting data from an application, transforming it into a format such as EDIFACT and transmitting it via a network to a different application. EDI is therefore a non-interactive activity, but the originating or receiving application can be either transactional or batch. According to M. Lepers, the EDI clearinghouses are the "motors" (a loose translation) driving EDI development.

M. Lepars noted that EDI should not be confused with File Transfer Management (FTM) products which recognize the file structure being routed, but do not recognize the file's data elements. He told attendees that EDI is not E-mail, nor is it X.400. Rather, EDI can be standardized on the international level through EDIFACT with the data elements recognized in their location within the message segment. According to M. Lepers, EDIFACT is aiming for "universality, neutrality and banality."

Segin has proposed that EDI implementations use Pelican, its FTM product which enables batch processing of transactions in EDIFACT. In order to work across multivendor installations, Pelican uses the X.25 packet switching data communications standards which conform to the first three layers of the OSI model. Pelican uses its own file transfer protocol called PEL, which is one of the most commonly used in France.

Continued on Page 10

SEGIN *. . . from page 9*

PEL protocol has three modes: PEL1 is for sequential file transfers; PEL2 is for file transfers of all types between two IBM/MVS machines linked in an SNA Cross Domain Architecture; and High Speed PELL Haute Vitesse is for sequential file transfers between two IBM/MVS machines linked in similar SNA architectures, but via high speed links such as PCM.

PEL can work with other communications standards such as the French banking format ETEBAC, and PeIST which have been recently developed by the interbank clearing system group. Other protocols supported by PEL are ODETTE, a European file transfer protocol which was developed by Groupment pour l'Amelioration des Liaisons dans l'Industrie Automobile (GALIA), an automotive industry association.

According to Pierre Lepers, a user who wants to move from FTM to EDI has already overcome a principal difficulty. Data can be "exploited" automatically and the user can evolve towards transaction processing, message by message. ■

GSI Building EDI for Transportation and Tourism

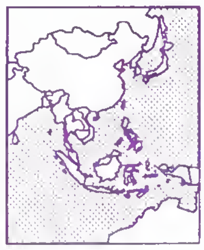
GSI, the largest European Value Added Network company, reports it is implementing EDI in two sectors where it has notable strength: tourism and transportation.

GSI, working with the Tourism Ministry and the Agency for the Development of Computer Information, is building an EDI system conforming to the LCT (language commun de transaction) format. The service will reside on the Esterel network whose servers are interconnected by GSI.

Essentially LCT is a syntax for the exchange of data between tourism and leisure organizations. Functions supported include tour information, messaging, reservations, and other transactions between producers, suppliers, and distributors. There is a recognized need to integrate the language with EDIFACT.

GSI has also developed DALOG, an EDI system for the European Freight transport industry, its agents and customers. In 1988, GSI integrated a Route Planner function into DALOG to help users optimized their transportation budgets. DALOG is being used by Opel (General Motors) for distribution from factories to warehouses (by rail) and on to dealerships. Electronic billing between various operations such as car transporters, freight agents and the dealers is also supported. ■

Japan Electronics Industry Adopting EDI



The Electronics Industries Association of Japan (EIAJ) has set up an EDI promotion center with some 115 member companies, chartered to work on EDI standards within the industry. The promotion center will also develop software. Basic standards are expected this month after several members report on their experiences in testing various protocols.

Meanwhile the **Internetwork VAN** in Japan has been offering EDI services using EIAJ standards, and also supporting EFT. The charge is three yen per 128 bytes. ■

News Bits

TDCC: The Electronic Data Interchange Association has moved. New address: Suite 550, 225 Reinekers Lane, Alexandria, VA 22315. (703) 838-8042. New members of the expanded board are: **Edwin Bradley** (Kraft, Inc.), **Thomas Colberg** (Price Waterhouse), and **Joanne Rang** (American Trucking Association).

IBM's Systems Integration Division has announced a quick and easy EDI implementation program for PC users. The IBM expEDIte/Integrated series provides services and software. An EDI Center has been established for remote installation support which will tailor software by entering transaction information, establishing communications profiles, and setting up trading partner information for IBM Information Network customers. Services are provided under fixed price $7,500 contracts plus network usage costs. This covers the software, eight hours of installation support, and 90-days of post installation support.

IBM's Information Network has overcome Japanese government restrictions and will link the U.S. and IBM/Japan networks using its SNA protocols. EDI is one service to be supported. Normal connection charges apply in both countries; traffic charges are accumulated in each country; and an international uplift is also levied. The IBM network earlier instituted a **single signature international contract policy**, meaning one bill for international usage.

AT&T Retail, the first industry specific package within the AT&T EDI offering, tracks inventory and sales information and generates reports for retail apparel businesses. The package, including computer, software, and network access, is designed to adapt to changing user needs.

More than one Regional Bell Operating Company, and at least one "independent" phone company, are moving towards EDI services. **Bell Atlantic** has submitted its plan to the FCC covering EDI and other services, with billing possible on the corporate phone bill. INPUT has learned that **business plans for EDI at two other RBOCs are nearing submission** to their respective board of directors. And **Cincinnati Bell Information Systems** is recruiting for an EDI Strategic Management Consultant for its Chicago office.

GE IS' Design*Express for CAD/CAM graphical exchange is now in commercial release. The company has established an alliance with **International Technegroup, Incorporated** (ITI-Cincinnati), described as the leading developer of CAD translation software. ITI consults companies on Concurrent Product Process (CPP) Development, a method for manufacturing at the same time a product is designed, reducing costs and cutting market lead time. According to **GE IS Product Marketing Manager John Schmarr**, "Effective use of the CPP Development technology can only occur when outside suppliers are brought into the initial design process. The ability to exchange both business document information (such as RFQs) and design data with suppliers early in the design phase is highly beneficial."

Software bits: EDI, Inc. has released Telink Tandem for Tandem CLX, VLX, and EXT platforms. **Metro-Mark Integrated Systems** has released Translator*VSE for IBM and compatible mid-range systems featuring the company's Document Distribution Control facility for managing document flows. Price is $22,500 including one year of updates, maintenance and support, and two-days of on-site installation assistance. **Supply-Tech**'s STX12 microcomputer software has been enhanced with a document turnaround feature and an unattended operations feature which enables around-the-clock communications. According to a press release issued by its U.K. office, **Perwill's EDI/3000 has been selected by Hewlett-Packard** for its corporate EDI Gateway in Palo Alto, CA.

American Business Computer, recently acquired by T&B Computing, has ported its mainframe XLT12 translator to the NCR 8565 mainframe. First installation is at Americal Corporation in North Carolina. A strategic marketing agreement between NCR and the software company is being worked on to cover sales through the NCR sales force and to the company's user base. Several NCR manufacturing sites are using the company's PC product running on NCR Tower systems.

Vic Henschel, formerly Director of Applications at **Western Union**, has replaced **Marty Weiss** as head of the company's EDI effort. Weiss (interviewed in last month's issue) is now in charge of the company's OfficeAccess offering.

Continued on Page 12

News Bits ...from page 11

Harbinger*EDI Services is a spin-off of Harbinger Computer Services (Atlanta, GA) which is working with Westinghouse Electric's communications network division and several banks to offer EDI and EDI/EFT services. Next month we'll provide a wrap-up of recent events in the banking sector relative to EDI services. **We have inside word that something "big" is brewing.**

We expect GE IS to win the coveted Government Services Administration EDI contract. The language of the RFP pretty much excludes other vendors from participating, including Martin Marietta which was low bidder on the pilot. GSA wants to join a network that has a substantial number of other users and that also has an international presence, particularly where the U.S. has offices. That means Western Europe, Japan, and the Philippines are high on the list. And GE IS has an EDI capability in all three, in addition to supporting EDIFACT, another criteria.

PaperFree Systems, Inc. of Washington, D.C. **has introduced a Computer Aided Software Engineering (CASE) tool to automate EDI data mapping.** Called WWIX-Map, for World-Wide Interchange eXpress Mapping, the product defines and formats the relationships between the application data base and X12 formats, generating an interface program to extract from or update to the data base files. It prompts users through the X12 data dictionary using pop-up windows.

According to the **Bank of Boston's Joseph Grimaldi**, the bank's Freight Management Service processed over two million EDI transactions covering freight bills in 1988, and expects to reach 3 million during 1989. The bank receives EDI transactions from motor carriers and air freight companies, either directly or through third parties. TranSettlements (Atlanta) is the largest third party working in this area. Then, the bank handles payment on behalf of shippers and receivers. The service also processes freight bills submitted on paper. ■

International EDI Users Congress Set

The first International Congress of EDI Users will be held at the Pan Pacific World Trade Center in Vancouver, British Columbia August 8-10. The event, being produced by the EDI Council of Canada (EDICC), will be in a venue overlooking the harbor.

"It will be first class" says Marshall Spense of the EDICC. Spense expects over 1,000 attendees from all over the world to be there. He hints that Brian Mulroney, Prime Minister of Canada, will be the keynote speaker. ■

EDI Events

March 21-22, Hyatt Regency at DFW, Dallas, TX, Quick Response '89, sponsored by AIM and VICS, (412) 963-8588.

April 3-5, Munich, West Germany, Computer Aided Trade COMPAT 89. Contact: Euromatica SA, 68 Avenue d' Auderghem, B.29, 1040 Brussels, Belgium, (322) 736-9715.

April 11-13, Hilton Hotel and Towers, New Orleans, ANSI X12 '89 Seminar, (703) 548-7005

April 13-14, Ramada Hotel, Alexandria, VA, The EDI Multi-Level Training Program, presented by Guilbert Associates and P. Lemme & Associates, (202) 785-4365.

* April 24, Hyatt Regency Embarcadero, San Francisco, CA. VICS EDI Orientation Seminar, sponsored by the Uniform Code Council, (513) 435-3870.

* April 24-27, Omni Hotel, San Diego, CA., Data and Computer Systems Committee meeting and EDI Roundtable, National Industrial Transportation League, (202) 842-3870.

April 24-25, Chicago, IL, How to Utilize Electronic Data Interchange, sponsored by the American Management Association and presented by Phyllis Sokol of Sterling Software Ordernet, (518) 891-0065.

* April 24-25, Hyatt Regency Hotel, Arlington, VA. , EDI Planning and Implementation Seminar sponsored by TDCC/EDIA, (703) 838-8042.

* April 25, Hyatt Regency Hotel, San Francisco., UPC Coordinators Seminar, sponsored by the Uniform Code Council, (513) 435-3870.

April 26-28, Sheraton Hotel, Toronto, Ontario, Principles of Electronic Data Interchange, presented by EDI Education and sponsored by Telecom Canada, (312) 848-0135.

* April 27-28, Dynasty Hotel, Singapore, EDI '89, sponsored by the Institute for International Research, 011-65-338-3521.

* April 28, Crowne Plaza Hotel, Atlanta International Airport, Transettlements Standards and Implementation Workshop, (404) 996-8109.

May 2-3, (tentative) Cincinnati, OH, Ordernet User Group Meeting, (614) 459-7500.

* May 2-3, Clarion Hotel, Cincinnati, OH, Exchange '89 - Ordernet Users Group Meeting, (614) 459-7500, updates previous listing).

* May 4-5, Hyatt Regency Hotel, Atlanta, GA., EDI Planning and Implementation Seminar sponsored by TDCC/EDIA, (703) 838-8042.

May 10-11, Cleveland, OH., EDI Catching the Wave, presented by Control Data Redinet Services, (800) 321-2012.

May 10-12, Hyatt Regency, Chicago, IL, Annual Corporate EFT/EDI Conference, sponsored by the EDI Group, (312) 848-0135.

May 11-12, Cafe Royal Hotel, Piccadilly Circus, London, NEW DATE AND PLACE for INPUT's EDI Intertrends - Europe. Comparing North American and European approaches to EDI, with research findings, user presentations, case studies, and vendor panels. (415) 961-3300 or 44-1-493-9335 (London).

May 15-16, Boston, MA, How to Utilize Electronic Data Interchange, sponsored by the American Management Association, (518) 891-0065.

May 15-19, Hyatt Regency Dearborn (Detroit, MI), ANSI X12 Meeting, (703) 548-7005.

* May 15-19, Hyatt Regency Dearborn, Detroit, MI, ANSI ASC X12 Meeting, (703) 548-7005.

* May 18-19. Hyatt Regency Hotel, Arlington, VA. EDI Planning and Implementation Seminar sponsored by TDCC/EDIA. (703) 838-8042.

May 17, Holiday Inn, Strongsville, OH (Cleveland), AIAG Supplier Support Group Meeting, (313) 569-6262.

May 17, Holiday Inn Airport, Indianapolis, IN, AIAG Supplier Support Group Meeting, (313) 569-6262.

May 18-19, Ramada Hotel, Alexandria, VA, The EDI Multi-Level Training Program, presented by Guilbert Associates and P. Lemme & Associates, (202) 785-4365.

May 18, Anixter Distribution, Chicago, IL, AIAG Supplier Support Group Meeting, (313) 569-6262.

May 24-25, Marriott Key Bridge, Arlington, VA, Management Issues in EDI, presented by INPUT's Victor S. Wheatman, and sponsored by Technology Transfer Institute, (213) 394-8305.

May 24-25, Marriott Hotel, Salt Lake City, UCS/WINS/VICS Users Group Meeting, (513) 435-3870.

* May 24-25, Salt Lake City Marriott, Salt Lake City, UT, EDI User Group Meeting, sponsored by the Uniform Code Council, (513) 435-3870.

May 24-26, Hyatt Michigan Avenue, Chicago, IL, Principles of Electronic Data Interchange, presented by EDI Education, sponsored by McDonnell Douglas, (312) 848-0135.

* June 8-9, Hyatt Regency Hotel, Bellevue, WA, EDI Planning and Implementation Seminar sponsored by TDCC/EDIA, (703) 838-8042.

June 12-14, Mayflower Hotel Washington, DC, NCITD International Trade and Computerization Conference, (212) 925-1400.

June 14-16, Sheraton Hotel, Toronto, ONT, Principles of Electronic Data Interchange, presented by EDI Education and sponsored by Telecom Canada, (312) 848-0135.

* June 20, Holiday Inn Crown Plaza, Seattle, WA, UCS/WINS Orientation Seminar sponsored by the Uniform Code Council, (513) 435-3870.

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EDI Events
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June 21-22, San Francisco. Electronic Mail Association Membership Meeting, (202) 293-7808.

* June 22-23, Hyatt Regency Hotel, Arlington, VA. EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

June 22-23, Ramada Hotel, Alexandria, VA, The EDI Multi-Level Training Program, presented by Guilbert Associates and P. Lemme & Associates, (202) 785-4365.

* July 12-13, Portland, ME, EDI Catching the Wave, presented by Control Data Redinet Services, (800) 321-2012.

* July 13-14, Hyatt Regency Hotel, Arlington, VA, EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

July 12-14, Marriott, Santa Clara, CA, Principles of Electronic Data Interchange, presented by EDI Education and sponsored by McDonnell Douglas, (312) 848-0135.

*** July 18-19, Portman Hotel, San Francisco, INPUT's EDI—The Next Generation Conference, (415) 961-3300.**

July 25-27, Marriott, Salt Lake City, UT, Principles of Electronic Data Interchange, presented by EDI Education and sponsored by Brigham Young University, (312) 848-0135.

* July 27-28, Hyatt Regency Hotel, Cambridge, MA, EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

August 8-10, Pan Pacific World Trade Center in Vancouver, British Columbia, International Congress of EDI Users, (416) 621-7160.

* August 10-11, Hyatt Regency Hotel, Minneapolis, MN, EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

August 14-18, Boston, MA, ANSI X12 Meeting, (703) 548-7005.

* August 17-18, Hyatt Regency Hotel, Arlington, VA, EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

* August 22, Hyatt Regency Nicollet Mall, Minneapolis, MN, UCS/WINS Orientation Seminar sponsored by Uniform Code Council, (513) 435-3870.

* September 12, Westin O'Hare Hotel, Chicago, IL, VICS EDI Orientation Seminar, sponsored by the Uniform Code Council, (513) 435-3870.

* September 13, Westin O'Hare, Chicago, UPC Coordinators Seminar, sponsored by the Uniform Code Council, (513) 435-3870.

* September 14-15, Hyatt Regency Hotel, Arlington, VA, EDI Planning and Implementation Seminar sponsored by TDCC/EDIA, (703) 838-8042.

* September 19-20, Portland, OR, EDI Catching the Wave, presented by Control Data Redinet Services, (800)321-2012.

* October 2-6, Los Angeles Airport Hilton and Towers, Los Angeles, CA, ANSI ASC X12 Meeting, (703) 548-7005.

October 5-6, Hilton Hotel, Chicago, Electronic Messaging '89, sponsored by the Electronic Mail Association, (202) 293-7808.

* October 12-13, Hyatt Regency Hotel, Arlington, VA, EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

* October 19-10, Grand Hyatt Hotel, New York, NY, EDI Planning and Implementation Seminar sponsored by TDCC/ EDIA, (703) 838-8042.

* October 31, November 1-2, London, EDI-89.

* November 8-9, Orlando, FL, EDI Catching the Wave, presented by Control Data Redinet Services, (800) 321-2012.

* November 9-10, Sheraton Centre, Toronto, Ontario, Third Annual EDI Forum sponsored by the EDI Council of Canada, (416) 621-7160.

* November 12-14, San Diego Marriott Hotel and Marina, TransComp '89, sponsored by the National Industrial Transportation League, (202) 842-3870.

* November 15, Westin Lenox, Atlanta, GA, UCS/WINS Orientation Seminar sponsored by Uniform Code Council, (513) 435-3870.

November 13-17 San Francisco or San Diego, CA, ANSI X12 Meeting, (703) 548-7005.

* November 16-17, Kansas City, MO, EDI Planning and Implementation Seminar sponsored by TDCC/EDIA, (703) 838-8042.

1990

* February 5-9, 1990, Atlanta Hilton and Towers, Atlanta, GA, ANSI ASC X12 Meeting, (703) 548-7005

* April 10-12, 1990, Las Vegas Hilton, Las Vegas, ANSI ASC X12 EDI Conference and Exhibit, (703) 548-7005.

* June 4-8, 1990, Radisson Mark Plaza Hotel, Alexandria, VA, ANSI ASC X12 Meeting, (703) 548-7005

* October 1-5, 1990, TBA, ANSI ASC X12 Meeting, (703) 548-7005 ■

Next Month

Focus on EDI in the Chemicals and Petroleum Industries

Merit Systems' XWAY Tandem Software

Late Breaking News on Banking EDI/EFT

INPUT's EDI Conference Plans: The Full Moon Will Rise ■

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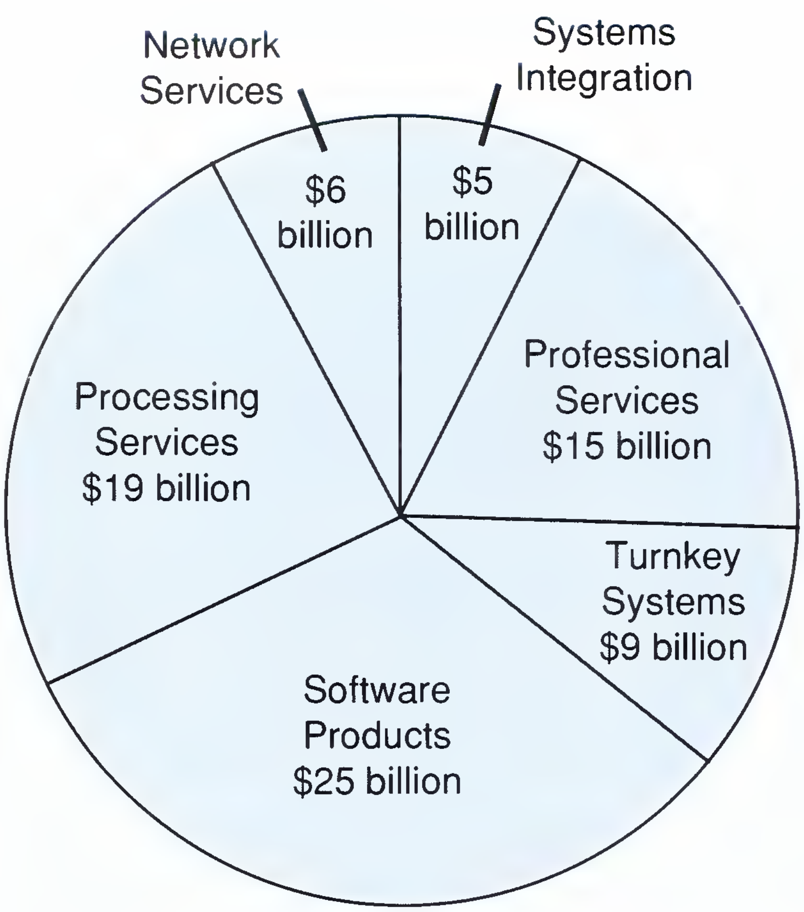

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REPORT SUMMARY

This thirteenth-annual Information Services Industry report has more facts and useful information than ever before. The data is compiled from over 1,000 interviews with information services vendors of all sizes and service types. You will receive *clear and concise* data about this *$79 billion market*. For more than fourteen years, leading information services vendors and users have relied upon INPUT for research-based analysis and forecast data. In this fast-moving industry, *reliable* data is the most important planning tool a manager or executive can use. All market sectors are covered in depth, with facts, figures, recommendations, and interpretations. Simply put, this report contains the most vital forecast information available, at a *fraction* of the cost of custom research. Order your copy today.

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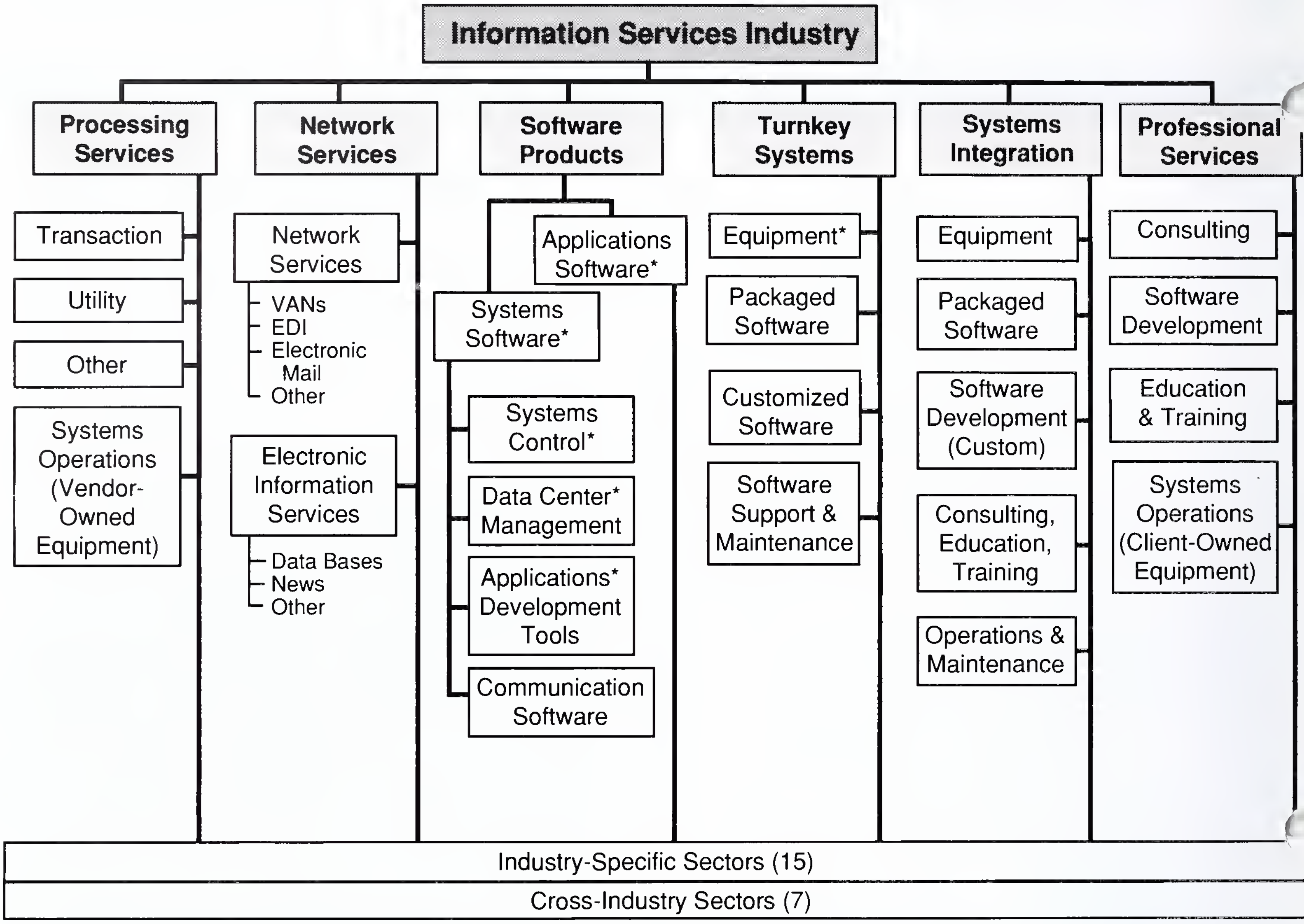
- What services will provide rapid growth
- How your growth rate compares to industry averages
- Which markets offer the greatest potential for future growth
- Effective marketing strategies
- Analyses of key vendors within each service type
- Revenue and net income of public companies by service type
- Performance comparisons by size of company

THIS RESEARCH IS DONE IN-HOUSE BY INPUT
This information is not available from any other source.

INFORMATION SERVICES INDUSTRY STRUCTURE—1989



*Broken out by Workstation/PC, Minicomputer, and Mainframe segments

Source: INPUT

About INPUT

INPUT provides planning information, analysis, and advisory services to major information services companies worldwide. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

INPUT carries out continuous and in-depth primary research. The company analyzes and interprets research data and develops recommendations and innovative ideas to meet the needs of the information systems and services industry.

INPUT's professional staff is experienced in both the user and vendor markets. Many staff members have over twenty years of experience in this business and have held senior management positions in marketing, planning, operations, and administration.

Formed in 1974, INPUT is a leading market research and consulting firm specializing in the information systems and services industry. Clients include the world's most technically advanced companies whose management receives ongoing advisory services, topical reports, conferences, and other planning data.

INPUT • 1280 Villa Street • Mountain View, CA 94041 • 415-961-3300
New York • Washington, D.C. • London • Paris • Tokyo

INPUT®

Computer Communications, Software and Services

European Market Studies

Customer Service Programme

The Customer Service Programme provides you with information on what your clients really want from vendors of hardware and software service. It examines market trends and discusses how various vendors are meeting today's challenges of changing user requirements.

The Reports

Forecast and Analysis Reports
Customer Service in Europe, 1987 Annual Report £1150
Customer Service in Europe, 1988 Annual Report £2500

Market/Issue Reports - 1987
Market Impact on Customer Service of Major Dealer Activities £575
Third-Party Maintenance Markets in Europe, 1986-1992 ....£575
Software Maintenance and Support Stategies £575
Customer Service Marketing Strategies in Europe £575
Customer Service Pricing Trends in Europe £575
New User Requirements/Vendor Offerings in Customer Service in Europe £575

Issue Reports - 1988
Independent Maintenance in Western Europe 1988-1993 ....£1600
Pricing Trends, Western European Customer Services £1600
Information Systems, Education and Training £1850

Market Studies - 1988
Customer Service Automation in Europe £1100
Disaster Recovery in Western Europe £1100
Inventory Control of Spares in Europe £1100
Professional Services Opportunities, Western European Customer Service £1195

INPUT Service Update, produced bimonthly £895

Reports Planned for 1989

Forecast and Analysis Report
Customer Service Annual Report £2500

Market/Issue Reports
Independent Maintenance Markets, 1989-1993 ....£1950
Customer Service Pricing Trends £1950
Software Maintenance and Support ...£1950
Impact of Service Quality Standards ..£1400
Fourth-Party Maintenance Opportunities £1400
Vendor Service Revenue Analysis £1400
Trends in Professional Services for Customer Service £1400

INPUT Service Update, produced bimonthly £995

Complete 1989 Programme Subscription £13,500

Market Analysis Programme

The Market Analysis Programme provides intelligence on the computer software and services markets. INPUT keeps abreast of market trends to keep you up-to-date with developments in the European marketplace, including competitive environments, changing user requirements and information on market opportunities.

The Reports

Forecast and Analysis Reports

European Information Services Industry, Analysis and Forecast, 1987-1992 .... £1250

The Western European Market for Computer Software and Services, Forecast and Analysis, 1988-1993 .... £1950

Market Reports - 1987

Systems Development Productivity Tools CASE £1250
Network Services, Directions £1250
Trends and Opportunities in Professional Services £1250
Trends in Software Pricing and Support £1250

Market Reports - 1988

Commercial Systems Integration, Western Europe £1950
Towards the Fifth Generation, European Market Opportunities £1950
Application Software Opportunities, Western Europe £1850
Network Services, Western European Market Opportunities £1850

Reports Planned for 1989

Forecast and Analysis Report:

European Information Services Industry, Analysis and Forecast 1989-1994 .... £2100

Market Reports

Professional Services £1950
Workstation Application Software £1950
Electronic Information Services £1950
Turnkey System Opportunities £1950
Software Maintenance and Support £1950

Complete Programme Subscription £8250

Vendor Analysis Programme

It is vital for vendors in the computer software and services markets to be aware of what the competition is offering. The Vendor Analysis Programme lists 400 vendors in the marketplace and profiles 170. The profiles include general company details; a summary of the company's origin, merger and acquisition history; a five-year financial summary; key products and services; industry markets served and information systems capability.

Reports Planned for 1989

Vendor Profiles, monthly including vendors of:
- Professional Services
- Systems Integration
- Applications Software
- Systems Software
- Processing Services
- Network Services
- Communications Services
- Turnkey Systems
- Third-Party Maintenance

List of Information Services Vendors - 400 vendors listed

1989 Programme Subscription £4950

Electronic Data Interchange Programme

This programme will keep you informed about this fast-changing and -growing technology. EDI has already become a requirement for doing business in some industries. In others, it is just a matter of time. EDI could completely change the way your company operates; can you afford not to be informed?

Reports Planned for 1989

Analysis Reports
EDI Intertrends, North America/Europe £1950
Advanced EDI Services £1950
EDI User Case Studies £1950

EDI Standards Reference Guide £995
EDI Reporter International Newsletter - monthly £495

Complete 1989 Programme Subscription £5950

1992

Everyone knows that 1992 means the lowering of trade barriers in the European Community. How this is going to affect your business is not so obvious. INPUT has carried out a study into what 1992 will mean specifically for companies in the computer and information services industry.

1992 Report £2500

Custom Research and Consulting

In addition to the standard continuous-information programmes, INPUT will work with you to develop and provide a customised research and consulting service to meet your specific requirements. INPUT specialises in client satisfaction studies and has carried out numerous such surveys on behalf of vendors.

Note: Prices exclude VAT for orders placed in the U.K.

About INPUT

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Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

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INPUT®

CUSTOMER SERVICE PROGRAM

Systems and Software Maintenance/Support

Customer Service Program (CSP)

HIGH PRESSURE, HIGH STAKES

The customer service marketplace is, and will continue to be, under tremendous pressure from:

- Drive to decrease service costs and increase profits.
- IBM's pace-setting drop in service prices.
- Increasing end-user demand for more and better service.
- Discounting, extended warranties, and increased systems reliability.

HIGH-VALUE INFORMATION

The need for sound customer service planning information is greater today than ever before! Accurate, relevant, and dependable information developed by well-informed customer service professionals is a requirement today.

HIGH-QUALITY OUTPUT

INPUT's Customer Service Program provides the high-quality information you must have.

PROGRAM OPTIONS

- You may select any combination of program modules as shown in the exhibit, or select any combination of reports and services. INPUT's CSP is designed to meet your specific needs.
- Subscribe to the full program or any module, and INPUT will include your applicable products/services in our standard coverage at no added fee.

CSP—USERS, VENDORS, MARKETS

SCOPE	LARGE-SYSTEMS SERVICE MODULE
REPORTS (3 per module. 9 in all)	Us
	Ve
	la
MONTHLY NEWSLETTER	Sn
CLIENT SUPPORT SERVICES	■ "Hotline" Client Inquiry Service ■ On-Site Presentation

SERVICE USER REQUIREMENTS REPORTS

Three separate **Service User Requirements Reports** are produced: one for Large Systems, one for Small Systems, and one for Third-Party Maintenance (TPM). Each report will cover:

- Equipment maintenance
- Software support
- Professional services
- Education and training

SERVICE VENDOR ANALYSIS REPORTS

Three distinct **Service Vendor Analysis Reports** are produced as part of the program: one for Large Systems, one for Small Systems, and one for TPM. Each report will:

- Profile key service vendors
- Analyze service discounting, warranty, and pricing practices and trends
- Address marketing tactics and strategies
- Examine specific service offerings

SMALL-SYSTEMS SERVICE MODULE	TPM SERVICE MODULE
User Requirements Reports	
Vendor Analysis Reports	
Market Analysis Reports	
Service Management Focus	
■ Conference ■ Access to INPUT Information Centers	

SERVICE MARKET ANALYSIS REPORTS

Three separate **Service Market Analysis Reports** are provided: one covering Large Systems, one covering Small Systems, and one covering TPM. Each report will:

- Present forecasts of user expenditures for service
- Report actual service user expenditures for the prior year (reconciliation included)
- Pinpoint new opportunities for service revenue
- Recommend specific action to increase revenue
- Examine key customer service issues
- Identify trends that could help or hinder success

NEWSLETTER *SERVICE MANAGEMENT FOCUS*

Key questions/answers posed by our clients through CSP's continuous Hotline Client Inquiry Service are reported, customer service issues are examined, and early release of key research results are included.

"HOTLINE" CLIENT INQUIRY SERVICE

CSP clients receive continuous support from INPUT's customer service consultants throughout their program year. The objectives of the service are to:

- Clarify/amplify CSP report and presentation data
- Provide informed opinion
- Fulfill short-term research needs (requiring fewer than 2 hours)
- Provide contract, discounting, and/or warranty information

Approximately 40 hours per year per client are reserved for "Hotline" services; this allotment can be increased at an additional fee.

ON-SITE PRESENTATION

INPUT will present cumulative results of all CSP research at your site once each year. You select the time and place. INPUT professionals will present to a group of any size; presentation time is approximately two hours, followed by a question/answer session.

ANNUAL ALL-CLIENT CONFERENCE

All INPUT forecasts are presented and discussed; user expenditures for service and the role of the customer service market in the information services industry is examined.

ACCESS TO INPUT INFORMATION CENTERS

You may access any of INPUT's four information Centers (CA, NJ, DC, UK). The California facility houses more than 150 trade publications, files on more than 4,000 information services vendors, extensive customer service vendor and industry files, and all INPUT studies conducted for general release.

About INPUT®

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INPUT®

CUSTOMER SERVICE PROGRAM EUROPE

Systems and Software Maintenance/Support

Customer Service Program—Europe (CSPE)

EFFECTIVE PLANNING—EFFECTIVE PERFORMANCE

INPUT's Customer Service Program—Europe (CSPE) provides the detailed customer service market information you need to:

- Increase customer service market share.
- Forecast future service requirements.
- Anticipate competitive service offerings.
- Make effective training and personnel decisions.
- Address the customer service challenges facing your organization.

CSPE: THE INFORMATION YOU NEED

Through research-based studies, presentations, informative meetings and continuous client support services, INPUT can help you answer these and other key customer service questions:

- What services do your users really require, and how can you meet their needs most efficiently?
- What is the competition doing, and how should you respond?
- Where are the sources of service revenue growth for the next five years?
- How will increases in hardware reliability and software complexity affect your personnel mix?
- What are the new service techniques, and how are they being received in the marketplace?

PROGRAM DESCRIPTION

CUSTOMER SERVICE ANALYSIS REPORTS (2 Volu

- Service Market Analysis Report
  - Small Systems (value under $75,000)
  - Medium Systems (value $75,000-500,000)
  - Large Systems (value greater than $500,000
  - Associated Systems Software
- Third-Party Maintenance Analysis Report
- Country-by-Country
  - United Kingdom
  - France
  - West Germany
  - Italy
  - Benelux
  - Scandinavia
- Survey of 1,600 Service Users

CUSTOMER SERVICE ANALYSIS REPORTS

Service Market Analysis Report
This annual report presents and summarizes the data collected from INPUT's annual survey of the customer service users in the European computer industry. The report is based on approximately 1,600 user telephone interviews conducted in Europe.

The report presents customer service data that Service/Marketing management can use to compare their company performance to that of their competitors and to contrast varied performance factors between different country markets (hardware systems are categorized as Small, Medium or Large). Service /support for both information systems and software will be covered, including importance and satisfaction levels for response times, fix times and systems availability.

Market size and vendor share information, user preferences on bundling, training requirements and future service needs are included.

Third-Party Maintenance Analysis Report
Examines and analyzes trends and opportunities TPMs in Europe. The report includes evaluation of the largest individual-country markets and TPM vendor profiles. User attitudes toward TPM are analyzed.

s)	MAJOR ISSUE REPORTS (2 Reports)
	• Pricing of Customer Service • Education and Training
	MARKET STUDIES (4 Reports)
	• Automated Service Systems • Disaster Recovery • Inventory Control of Spares • Changing User Requirements
	CLIENT SUPPORT
	• "Hotline" Inquiry Service • Bimonthly Newsletter • Meetings at Client's Site

MAJOR ISSUE REPORTS

Pricing of Customer Service
This report examines and analyzes customer perceptions of the level of importance and acceptability of service pricing for software and hardware support.

Education and Training
The education and training market will exceed $3 billion in Western Europe by the early 1990s. Growth is fostered by increased awareness of skilled human resources as a corporate asset, rapid technology changes, increased range of software productivity tools and the growth of end-user computing. The report examines this market in detail, identifying areas of future growth, marketing strategies being adopted, and user attitudes/needs in an area with a scarcity of skilled people but a burgeoning need.

MARKET STUDIES

Automated Service Systems
This concise report provides a synopsis of the state-of-the-art and opportunities for implementing automated service systems.

Disaster Recovery
Hot and cold recovery services are examined, together with analysis of customer importance perceptions for these backup services. Market opportunities are discussed.

Inventory Control of Spares
This report provides a consultative review of the range of spares inventory strategies available to the service manager to achieve service and cost optimization. User attitudes and experience with spares-related issues are presented.

Changing User Requirements
This report provides an overview of the changing customer perceptions of support and service needs as revealed by INPUT's comprehensive user research program. The analysis is broken down by country and industry.

CLIENT SUPPORT

"Hotline" Client Inquiry Service
Call INPUT's Customer Service Hotline and receive the answers to your most challenging questions. In many cases, INPUT's consultants can respond immediately. If further investigation is required, INPUT will interview vendor organizations, obtain product and marketing literature for you, obtain service pricing information, consult INPUT's research data base or conduct other research to supply the information you need.

Bimonthly Customer Service Newsletter
Topical news is provided about customer service in Europe and the USA (e.g., new vendor service policies, service offerings, vendor performance).

Meetings at your Site
Two meetings are held at your site. First, INPUT consultants will present an executive overview of research conducted during your subscription year. The second meeting will be arranged to meet your specific requirements.

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INPUT®

ELECTRONIC DATA INTERCHANGE PROGRAM

Electronic Data Interchange Program (EDIP)

NEW REVENUE OPPORTUNITY

By 1992, Electronic Data Interchange (the application-to-application exchange of business transaction data) will provide a $2.4 billion market opportunity for information services vendors.

Seldom has an application caught on with such intensity. In some industries, EDI has become a requirement to do business; in others it's just a matter of time.

EDIP—PREPARE FOR SUCCESS

INPUT's Electronic Data Interchange Program (EDIP) is designed to help you take advantage of EDI market opportunity—to pinpoint specific opportunities, to show you how to improve your EDI plan, and to prepare you for the future, so you can be a successful player in the growing EDI market.

PROGRAM DESCRIPTION

EDI ANALYSIS REPORTS

- Market Analysis
- Competitive Analysis
- Vertical Markets (30 sectors)
- Professional Services
- X.400 Products and Services
- VANs/VADs European Market

EDI REPORTER NEWSLETTER

- Monthly
- Issues, Events, Interviews
- Users, Vendors

EDI CONFERENCE

- Two-Day, Users/Vendors

CLIENT SUPPORT

- "Hotline" Client Inquiry Services
- Access to Information Centers
- All-Client Conference (3-day)

Start-up Library of Reports Available

INPUT

ANALYSIS REPORTS

EDI Market Analysis, 1988-1993
User expenditures for EDI services are forecast; EDI component service segmentation. New revenue opportunities, trends and issues impacting growth are covered.

EDI Competitive Analysis
Present and potential EDI service providers are profiled, market shares are presented, competitive positions and strategies are examined.

EDI Vertical Market Analysis
Examines EDI usage in approximately 30 vertical markets; identifies major users and industry-specific issues; examines EDI expenditures.

EDI Software Analysis, 1988-1993
User needs and expenditures are presented, functionality of specific EDI products are examined, revenue opportunities and vendor market share included in this two-volume analysis.

EDI and Professional Services
Systems integration, software customization, education/training, and facilities management relative to EDI implementation are analyzed.

X.400 Products and Services
Describes the nature of this international messaging standard, its relationship to electronic mail, voice and video communications, and its implications for EDI.

VANs/VADs European Market Directions
Value Added Networks (VANs) and Value Added Data (VADs) service opportunities and applications services (EDI, on-line data bases, EFT/POS, etc.) opportunities are analyzed and forecasted. Issues affecting users/vendors are presented, European telecommunications environment is examined.

EDI CONFERENCE

EDI forecasts, trends, directions are presented and discussed by users, vendors, and INPUT EDI professionals in this two-day forum.

EDI REPORTER NEWSLETTER

The latest information on vital EDI issues, events, vendor actions, user experiences are presented in this monthly newsletter. First published in early 1987, *EDI Reporter* has become the most relied upon source of timely EDI information.

CLIENT SUPPORT

"Hotline" Client Inquiry Services
EDIP clients receive continuous support from INPUT's Electronic Data Interchange consultants throughout their program year. The objectives of the service are to:

- Clarify/amplify EDIP report, presentation, and newsletter data
- Provide informed opinion
- Fulfill short-term research needs (requiring fewer than 2 hours)

Approximately 40 hours per year per client are reserved for "Hotline" services; this allotment can be increased at an additional fee.

Annual All-Client Conference
All INPUT forecasts are presented and discussed in this three-day event.

Access to INPUT Information Centers
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INPUT®

FEDERAL INFORMATION SYSTEMS AND SERVICES PROGRAM

Federal Information Systems and Services Progra

FEDERAL MARKET OPPORTUNITY

The federal government will spend more than $18 billion dollars annually on computer systems, computer services, software, and communications by 1992.

FISSP—WIN FEDERAL BUSINESS

The majority of these dollars will be won by vendors well-informed about federal procurement plans and practices. INPUT's Federal Information Systems and Services Program (FISSP) can help you win federal business.

PROCUREMENT ANALYSIS REPORTS (PARs)

PARs (described below) identify and track individual Defense and Civil Agency procurement opportunities up to five years in advance of RFP release; indexed by agency, fiscal year, and system/service mode. "Classified" programs are excluded from coverage. Clients receive PARs monthly.

PROCUREMENT ANALYSIS REPORTS (PARs) CONTAIN:

Agency Name
Program Title
Funding by Fiscal Year
Procurement Schedule Target Dates
- Draft
- CBD Announcement
- Pre-Bid Conference
- RFP-RFQ Release
- Bid Due Date
- Award Date

Budget/Procurement Code
Description of Program
Systems/Services to Be Acquired
Contract Types
Contract Duration
Contracting Office (Name and Address)
Program Office (Name and Address)
Background/Function
Analysis
Acquisition Plan
Awards to Date

FISSP—Procurements, Markets, Agencies, V

PROCUREMENT ANALYSIS REPORTS

- Defense & Civil Agencies
- Indexed by Agency, Fiscal Year, and Systems/Service Mode
- Monthly Reports

FEDERAL SYSTEMS & SERVICES CONFERENCE

2-day, Washington D.C.

CLIENT S

- Federal "Hotline" Inquiry Service
  - Agencies
  - Procurements
  - Markets
  - Vendors

MARKET ANALYSIS REPORTS (MARs)

Large-Scale Systems
Covers the federal market for large scale systems, including supercomputers. Discusses the growing importance of software in accommodating federal mission needs. Agency strategies for large scale systems, including the risks associated with major acquisitions examined, specific procurement opportunities identified.

Mid-Size Systems
Focuses on the federal market for midsize systems, with a view toward both mission and procurement trends affecting that market. Digital's market dominance is compared with IBM's ongoing efforts to penetrate it, and efforts of other vendors. Discusses agency strategies and identifies specific procurement opportunities.

NASA Information Services Market
Focusing on the National Aeronautics and Space Administration (NASA), the report analyzes information resources, applications, requirements, and acquisition plans for both headquarters and field offices. The agency's mission orientation and use of advanced information technology are discussed as they relate to future opportunities.

Federal Professional Services Market
Forecasts the professional services market including consulting, education, training, programming and

ISP)

dors

MARKET ANALYSIS REPORTS
• Large-Scale Systems • Mid-Size Systems • NASA Information Services Market • Federal Professional Services Market • Federal Systems Integration Market • Federal Telecommunications Market • Federal Office Information Systems Market
PPORT
• Federal Information Center • Annual All-Client Conference

analyses, facilities management, systems integration, and additional specific opportunities. Contains discussion of the agencies' and vendor's perspectives of the market and factors influencing the marketplace.

Federal Systems Integration Market
Examines industry trends, market sizes and forecasts for the federal systems integration market. Discusses the federal government's replacement of obsolete information systems and acquisition of integrated and turnkey systems. Analyzes economic, competitive and regulatory factors which will impact the systems integration market.

Federal Telecommunications Market
Reports on the telecommunications market; discusses current and planned acquisitions of networks and new telephone systems in anticipation of future cost increases and mission requirements. Major issues covered include standards, technology impact, competitive trends, and industry reactions to GSA telecommunications initiatives.

Federal Office Information Systems Market
Identifies and discusses federal office information systems hardware and services being procured by the federal government. Agency strategies and specific procurement opportunities are identified; products and marketing strategies of the major industry vendors in the office information systems market are examined.

FEDERAL SYSTEMS AND SERVICES CONFERENCE

Two-day conference held annually in Washington, D.C.; covers INPUT federal market research and presents expenditure forecasts.

CLIENT SUPPORT

Federal "Hotline" Client Inquiry Service
FISSP clients receive continuous support from INPUT's Washington consultants throughout their program year. The objectives of the services are to:

- Provide informed opinion
- Fulfill "short-term" research needs (requiring fewer than 2 hours)
- Clarify/amplify FISSP report and presentation data
- FOIA requests (nominal additional fee)

Access to INPUT Information Centers
Access INPUT's Federal Information Center, which houses hundreds of agency planning and procurement documents and a wide array of government-related research sources or other INPUT centers.

Annual All-Client Conference
All INPUT forecasts are presented and discussed; sessions of specific interest to FISSP clients are held.

CUSTOM RESEARCH AND CONSULTING

INPUT can provide custom research and consulting to clients for an additional fee. Such areas as agency research, competitive analysis, technology impacts on federal markets, contract award research, agency selection practices, and specialized forecasting can be addressed.

About INPUT®

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

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INPUT®

INFORMATION SYSTEMS PROGRAM

Information Systems Program (ISP)

CRITICAL ROLE

IS plays a critical role in a company's competitive position, often making the difference between company profit and loss.

Today, IS must meet end-user demands for quality and fast response as well as corporate demands for reduced spending.

IS managers must find new ways to offset costs and leverage investments, while keeping pace with rapid IS evolution.

ISP—THE POWER TO KEEP PACE

INPUT's Information Systems Program (ISP)—designed, developed, and run by experienced IS executives—can help you keep pace.

PROGRAM DESCRIPTION

REPORT SERIES	
#1	DBMS: Current Trends and Challenges
#2	Workstation Strategies (four report series)
#3	ISDN & Voice/Data Integration (two reports)
#4	Information Systems Planning Report
#5	CASE and Application Development Productivity
INDUSTRY SECTOR REPORTS	
15 Specific Industries	
SEMINARS	
Two per program-year	
CLIENT SUPPORT	
#1	"Hotline" Client Inquiry Service
#2	On-Site Presentation
#3	Access to INPUT IS Professionals and Information Centers
#4	Conference
Start-Up Library of Reports Available	

BY EXECUTIVES FOR EXECUTIVES

INPUT's Information Systems Program was designed by IS executives who understand your critical need for concise, timely, and relevant information at an affordable price.

INPUT

REPORT SERIES

Data Base Management: Current Trends and Challenges
Thorough assessment of progress made in relational and distributed data base management systems application, organization, and operations issues caused by evolving data base management technology and state-of-the-data administration process.

Workstation Strategies Report Series
Four reports that analyze the workstation technology within the general business systems environment. Topics include:

- Integration of PCs into the central information network.
- Use of computers as workstations.
- Application design.
- Workstation vendor strategies and plans.

ISDN and Voice/Data Integration
Concise management perspectives on two critical telecommunications issues.

CASE and Application Development Productivity
Analyzes the application development challenges and examines opportunities offered by Computer-Assisted Systems Engineering (CASE) technology.

Annual Information Systems Planning Report
A comprehensive analysis of critical business trends, technology, and information systems issues and budgets.

INDUSTRY SECTOR REPORTS

15 specific end-user market sectors are forecasted and analyzed.

SEMINARS

INPUT conducts two seminars per calendar year designed for IS executives and managers. All ISP clients may attend at no added fee.

CLIENT SUPPORT

"Hotline" Client Inquiry Service
ISP clients receive continuous support from INPUT's Information Systems consultants throughout their program year. The objectives of the service are to:

- Provide telephone consultation
- Fulfill "short-term" research needs (requiring fewer than 2 hours)
- Clarify/amplify ISP report and presentation data.

Approximately 40 hours per year per client are reserved for "Hotline" services; this allotment can be increased at an additional fee.

On-Site Presentation
INPUT will present cumulative results of all ISP research at your site once each year. You select the time and place. INPUT professionals will present to a group of any size; presentation time is approximately two hours, followed by a question/answer session.

Access to INPUT IS Professionals/Information Centers
As a client you are invited to contact our IS consultants and/or use any of INPUT's four Information Centers (CA, NJ, DC, UK,) as well. The California facility houses more than 150 trade publications, files on more than 4,000 vendors, more than 300 industry/application files, and all INPUT studies conducted for general release.

Annual All-Client Conference
All INPUT forecasts are presented and discussed; sessions of specific interest to ISP clients are held.

About INPUT®

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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INPUT®

MARKET ANALYSIS PROGRAM

U.S. Information Services Industry

Market Analysis Program (MAP)

MAP—INDUSTRY SEGMENTATION

INDUSTRY-SPECIFIC SECTOR FORECAST AND ANALYSIS
Banking/Finance
Discrete/Process Manufacturing
Distribution (Retail/Wholesale)
Education
Medical
Insurance
Utilities
Government (Federal/State/Local)
Transportation
Telecommunications
Service Industry
Other Industry-Specific Sectors
CROSS-INDUSTRY SECTOR FORECAST AND ANALYSIS
Engineering/Scientific
Human Resources
Education/Training
Planning and Analysis
Accounting
Office Systems
Other Cross-Industry Sectors

REVENUE OPPORTUNITY DOUBLES

The information services industry, among the fastest growing sectors in the U.S. economy, has doubled in size during the last several years. This doubling trend is expected to continue, with user expenditures for information services reaching $137 billion by 1992.

MAP—THE RELIABLE SOURCE

INPUT's Market Analysis Program (MAP) pinpoints and analyzes key information services markets and provides research-based information to help you take advantage of them.

INDUSTRY SECTOR REPORTS

15 industry-specific market sectors and 7 cross-industry market sectors are forecasted/analyzed in 22 separate Industry Sector Reports (see exhibit).

MARKET FORECAST REPORTS

Four Market Forecast Reports are produced annually. Five-year user expenditure forecasts and prior-year actuals are presented with forecast reconciliation; complete market analysis included.

Professional Services Forecast Report
Includes Consulting, Education and Training, Software Development, Systems Integration, and Systems Operations markets; industry sector segmentation.

Software Products Forecast Report
Includes Systems Software markets (Systems Control, Data Center Management, and Applications Development Tools) and system environment (workstation/PC, minicomputer, mainframe) segmentation.

Includes Applications Software markets; industry sector and systems environment (workstation/PC, minicomputer, mainframe) segmentation.

Processing/Network Services Forecast Report
Includes Processing Services (Transaction Services, Utility Services, Other) markets; industry sector segmentation.

Includes Value-Added Network Services, Electronic Data Interchange, Electronic Mail and Electronic Information Services (data bases, news services, and videotex) markets; industry sector segmentation.

Turnkey Systems Forecast Report
Includes Turnkey Systems equipment, packaged software, and customized software markets; industry sector segmentation.

INPUT

ISSUE STUDIES

SAA—Impact on the Industry
A complete review of IBM's Systems Application Architecture (SAA): development progress made, potential challenges/successes, expectations and impact, and market forecast.

CASE—A Comprehensive Analysis
Examines issues, trends and events shaping the Computer-Assisted Systems Engineering (CASE) market; recommends best vendor actions.

SI Impact on Professional Services Market
Shows how systems integration (SI) is changing the professional services vendor role; examines user requirements and opportunities available to both traditional and full-service professional services vendors.

Emerging Network-Based Information Service Markets
Includes voice and image services, network backup, network operations, network distribution/support for software, business bulletin boards, and consumer information service markets. Vendor opportunities and recommended actions are presented.

VAR—Alternate Distribution Channels
Investigates the viability of Value-Added Resellers (VAR) as a channel of distribution for traditional information services.

CLIENT SUPPORT

"Hotline" Client Inquiry Services
MAP clients receive continuous support from INPUT's Information Services industry consultants throughout their program year. The objectives of the service are to:

- Provide informed opinion

(continued next column)

- Clarify/amplify MAP report, forecast, and presentation data
- Fulfill short-term research needs (requiring fewer than 2 hours)

Approximately 40 hours per year per client are reserved for "Hotline" services; this allotment can be increased at an additional fee.

Vendor Financial Watch
Vendor Financial Watch (VFW) provides quarterly updates of revenue and net income performance of the top 140 public information services vendors; eight-quarter comparison is presented.

Five market areas are analyzed: processing services, network services, software products, professional services/systems integration, and turnkey systems.

On-Site Presentation
Presentation of cumulative results of MAP research at your site once each year. You select the time and place. INPUT analysts will present to a group of any size; presentation time is approximately one-half day.

Annual All-Client Conference
All INPUT forecasts are presented and discussed in this three-day event.

Access to INPUT Information Centers
You may access any of INPUT's four Information Centers (CA, NJ, DC, UK). The California facility houses more than 150 trade publications, files on more than 4,000 information services vendors, extensive industry/application market files, and all INPUT studies conducted for general release.

The Market Analysis Program (MAP) was formerly titled Market Analysis and Planning Service (MAPS).

About INPUT®

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INPUT®

MARKET ANALYSIS PROGRAM EUROPE

Information Services Industry

Market Analysis Program—Europe (MAPE)

PLAN FOR SUCCESS

INPUT's Market Analysis Program—Europe (MAPE) is a set of continuing services that provide timely and accurate intelligence on some of the fastest-moving markets in the world. How much you know about them and when you find out could spell the difference between profit and loss for your firm.

USE A POWERFUL SERVICE

A powerful service for tracking and anticipating market trends, MAPE provides you with the information you need, including:

- An incisive view of European information services markets.
- In-depth analysis of the dynamics of the user and competitive environments.
- Invaluable advice for vendors seeking to address or re-evaluate their strategy for exhibiting market opportunities.

FORECAST AND ANALYSIS REPORT

European Information Services Industry Analysis and Forecast 1988 - 1993
This report provides an analysis and five-year forecast for information services in the major European geographical markets of France, Italy, the United Kingdom, West Germany, Benelux, and Scandinavia. In addition, an assessment of the market in other European countries is also included.

Estimates of the total size of each geographical market are given together with growth rate predictions to 1993.

Major industry trends, issues and growth factors will be reviewed together with an analysis of successful vendor strategies, the competitive environment and key opportunities available to industry players.

STRATEGIC ISSUE REPORTS

Value-Added Data Services
Value-added services continue to develop as an area of high focus as information services vendors seek to exploit the opportunities of computer communications convergence. The strategic importance of VADs is also reflected by the high levels of commitment shown to this market by government bodies and telecommunications operators. Building upon previous INPUT research in this important sector, this report focuses on key application development areas for services vendors, for example EDI and EFT/POS.

Commercial Systems Integration Markets
Systems Integration is an area of market focus that came to prominence in 1987 as major vendors have begun to stake out their strategic positions in this potentially very large marketplace. Although to date the growth of this sector has primarily been driven by the large development needs of the defence sector, new opportunities are beginning to emerge in the commercial and civil government sectors. This report examines the scale of these opportunities in the commercial sector within Western Europe.

Education and Training
INPUT has estimated that this market will reach over $3 billion in Western Europe by the early 1990s. The phase of buoyant growth is fostered by increased awareness of skilled human resources as a corporate asset, rapid technological change, increased range of software productivity tools and the growth of end-user computing. This report examines this market in detail, identifying the areas of fastest growth and the marketing strategies being adopted, as well as user attitudes and needs in an area with a scarcity of skilled people and a burgeoning need.

Key Application Software Opportunities
Software products continue to remain the fastest-growing market within information services. Equipment manufacturers are paying increasing attention to the development of application software revenues, thus creating an increasingly competitive environment for independent software product vendors and standard turnkey system suppliers. The development of successful products within this fast-chang-

ing market is thus one of the most challenging planning questions for information service vendors. This report examines the area of key growth and profit potential, looks at the marketing strategies adopted by both equipment manufacturers and independent vendors and provides insights into user attitudes, needs and requirements.

Fifth-Generation Software Engineering
The efficient production of software to meet business requirements on time and within budget has now emerged as a partial reality through the emergence of Computer-Aided Software Engineering Techniques and Tools. As computer systems themselves incorporate ever-increasing functionality, so have the opportunities for advanced system software grown. This report examines the key opportunities in the areas of advanced languages, data base systems and the overall development environment. The dynamics and evolutionary trends in the competitive environment, together with analyses of leading products and vendors are examined.

CLIENT SUPPORT

Market Intelligence Service
INPUT's experienced staff is available throughout the subscription period to provide you with advice on issues, trends and developments within the information services industry.

The service provides valuable support to client organizations in the areas of marketing planning, product positioning, competitor analysis, acquisition/partnering agreements and marketing communications.

You will also receive a regular communication from INPUT's director of research relating to key developments and issues in the information services industry.

Consultant Presentations
INPUT's consultants, who have all held marketing management positions in the information services industry, are available to provide you with presentations on chosen topics for a group of your colleagues.

Annual Joint Client Conference
Held in London during the fourth quarter of 1988, this annual conference will enable INPUT's clients to be updated on key strategic industry trends and developments, as well as meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

FORECAST AND ANALYSIS REPORT

- 5-year Forecast
- Country Market Analysis
  - France
  - Italy
  - United Kingdom
  - West Germany
  - Benelux
  - Scandinavia

STRATEGIC ISSUE REPORTS

- Value-Added Data Services
- Commercial Systems Integration Markets
- Education and Training
- Key Application Software Opportunities
- Fifth-Generation Software Engineering

CLIENT SUPPORT

- Market Intelligence Service
  - Inquiry Service
  - Ongoing dialog with INPUT Professionals
- Annual Client Conference
- Access to INPUT Information Centers
- Presentations Available

The Market Analysis Program—Europe (MAPE) was formerly titled Software and Services Program—Europe (SSPE)

About INPUT®

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INPUT®

SYSTEMS INTEGRATION PROGRAM

U.S. Information Services Industry

Systems Integration Program (SIP)

THE SYSTEMS INTEGRATION OPPORTUNITY

Systems Integration (SI), the provision of complex information systems requiring multiple products and services, has become of strategic interest and importance to both users and vendors.

Urgency of large-scale project development requirements, the multivendor nature of engagements, the absence of acceptable off-the-shelf solutions, and the user desire for single-vendor interfaces are all contributing to the shift to the SI approach.

By 1992, the total SI market (including both commercial and federal SI) is expected to grow to more than $13.7 billion!

INPUT's System Integration Program (SIP) provides research-based answers to these questions and more:

- What is Systems Integration? What are its component services?
- How will it impact other information services market opportunities (software, processing services, professional services, turnkey systems)?
- Will it significantly change today's and tomorrow's competitive environment? Who can afford to enter the game?
- What about strategic alliances? How do they work? What are the contractual issues?
- What is the user perception of SI?
- What's the size of the federal and nonfederal SI markets? Where do the real market opportunities lie?

SI MARKET ANALYSIS REPORTS

SI Buyer Issues and Trends Report
Assesses the driving forces behind systems integration and the issues facing this systems development process from three points of view: corporate/senior management, the Information System function, and the users of the resulting system. INPUT draws on its ongoing assessment of the IS environment of large organizations and numerous systems integration case studies.

SI Competitive Analysis Report
Examines competitive environment, prime and subcontractor relationships, primary and secondary marktetplaces, and alliances.

SI Forecast and Trends Report
Forecasts user expenditures for systems integration over the next five years; industry segmentation, SI component service segmentation. Includes reconciliation of prior forecasts. Identifies trends and forces driving growth.

SI PROJECT PROFILES (SIPP)

SIPP identify and track both federal and nonfederal systems integration projects. The SIPP data base now covers important projects already awarded and is building preaward SI project information.

SI Project Profiles include:

- Contractor Information (Company and Function)
  - Prime Contractor
  - Subcontractors
  - Outside Consultants
- Business Problem (Statement of Problem/Objectives)
- Major Tasks
- Contract Information
  - Type
  - Dollar Value
  - Duration
  - Schedule
  - Special Conditions
- Project Component Analysis (Component, Descriptions, Source)
  - Computer and Communications Equipment
  - Professional Services
  - Software Products and Development
  - Maintenance
  - Systems Operations
  - Other Information Services Components
  - Other Non-Information Services Components
- INPUT Insights
  - Favored Vendors
  - Anticipated Margins
  - Alliances
  - Customer Satisfaction Levels
  - Future Plans
  - Other Relevant Information

You will receive monthly shipments of research-based SI Project Profiles.

CLIENT SUPPORT

Hotline Client Inquiry Service
INPUT's SI team provides response to your most urgent SI questions. Your questions can be posed to INPUT by telephone, fax, or telex.

In addition to the questions you generate, INPUT SI specialists will call you with crucial "current event" information and/or data deemed important to you and your firm.

SI Seminars
INPUT conducts two SI seminars during the program year, designed to provide useful buyer, vendor, and market data that can be readily applied to SI sales and marketing problems.

***SI Reporter* Newsletter**
As events warrant, INPUT will deliver issues of the *SI Reporter*, an informative systems integration newsletter.

Annual Presentation at Your Site
A member of INPUT's SI team will present the results of SI research at your site. This important session is generally held during the fourth quarter of the program year.

Annual All-Client Conference
All INPUT forecasts are presented and discussed in this three-day event.

Access to INPUT Information Centers
SIP clients may access any INPUT Information Center; California, New Jersey, and Washington, D.C. Each center houses a complete set of all INPUT syndicated research. As a client, you may access all INPUT studies.

About INPUT®

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VENDOR ANALYSIS PROGRAM

U.S. Information Services Industry

Vendor Analysis Program (VAP)

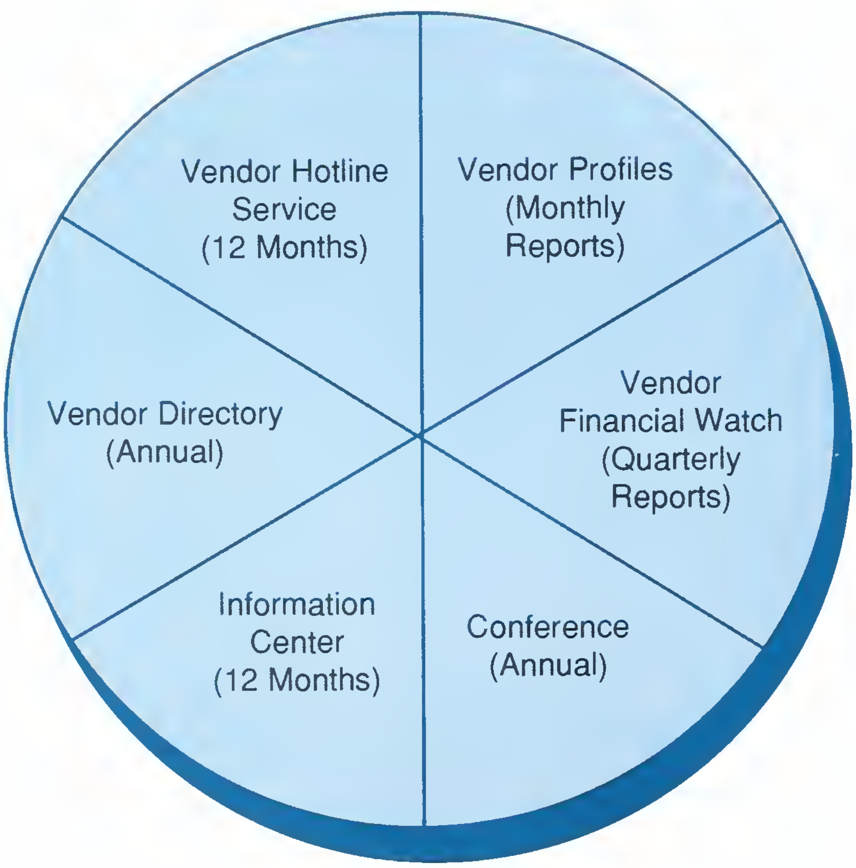
COMPLEX AND COMPETITIVE

Today's "niche-oriented" information services environment is complex and highly competitive.

Knowledge of competitive vendor offerings (public and private companies), vendor performance, and market penetration are required. Vendor-oriented information to support merger, acquisition, and alliance decisions is crucial.

VAP—THE EDGE YOU NEED

INPUT's Vendor Analysis Program (VAP) provides the competitive edge you must have—reliable data on private and public information services vendors.



CLEAR-CUT AND COMPREHENSIVE

INPUT's Vendor Analysis Program (VAP), relied upon by industry leaders since 1976, provides a sharp and complete picture of your competition through:

VENDOR PROFILES

Accurate, concise analyses of public and private information services vendors are the cornerstone of VAP.

Vendor Profiles include:

- General Information (company name, address, telephone, CEO name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- 5-year financial summary
- Key products and services
- Industry markets served
- Geographic markets served
- Information systems (hardware and software) capability
- And more

Vendor profiles are based on research conducted by INPUT; clients receive shipments monthly.

VENDOR FINANCIAL WATCH

Vendor Financial Watch (VFW) provides quarterly updates of revenue and net income performance of the top 140 public information services vendors; eight-quarter comparison is presented.

Five market areas are analyzed: processing services, network services, software products, professional services/systems integration, and turnkey systems.

INPUT®

VENDOR "HOTLINE" SERVICE

VAP clients receive continuous support from INPUT's information services vendor consultants throughout the program year. The objectives of the service are to:

- Clarify/amplify VAP vendor data
- Provide telephone consultation
- Fulfill "short-term" vendor research needs (requiring fewer than 2 hours of research)

Approximately 40 hours per year per client are reserved for "Hotline" services; this allotment can be increased at an additional fee.

ACCESS TO VENDOR INFORMATION CENTERS

You may access any of INPUT's Information Centers (CA, NJ, DC, UK). The California facility houses more than 150 trade publications, files on more than 4,000 information services vendors, more than 300 industry/application files, and all INPUT studies conducted for general release.

ANNUAL ALL-CLIENT CONFERENCE

All INPUT forecasts will be presented and discussed; the competitive environment will be analyzed.

DIRECTORY OF INFORMATION SERVICES VENDORS

Alphabetic list of approximately 3,000 information services vendors along with summary data. Indexed by geographic market served and mode of services offered.

TYPES OF VENDORS COVERED

- Systems Integration Vendors
- Professional Services Vendors
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations
- Applications Software Vendors
- Systems Software Vendors
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools
- Processing Services Vendors
  - Transaction Services
  - Utility Services
  - Other Processing Services
- Network Services Vendors
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information Services
- Turnkey Systems Vendors
- Third-Party Maintenance Vendors

The Vendor Analysis Program (VAP) was formerly titled Company Analysis and Monitoring Service (CAMS).

About INPUT®

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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INPUT®

VENDOR ANALYSIS PROGRAMME—EUROPE

1989 Vendor Analysis Programme—Europe

PROGRAMME DESCRIPTION

VENDOR PROFILES

Accurate, concise analyses of public and private information services vendors are the cornerstone of the Vendor Analysis Programme. Fifty new profiles a year are planned.

Vendor Profiles include:

- General Information (company name, address, telephone, chief executive's name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- 5-year financial summary
- Key products and services
- Industry markets served
- Geographic markets served
- Information systems (hardware and software) capability

Vendor profiles are based on research conducted by INPUT; clients receive shipments monthly.

LIST OF INFORMATION SERVICES VENDORS

Alphabetic list of approximately 400 European information services vendors along with summary data. Indexed by country market service and mode of services offered. Typically the companies will have revenues of $5 million or more.

INPUT®

VENDOR MARKET INTELLIGENCE SERVICE

Clients of the Vendor Analysis Programme receive continuous support from INPUT's information services vendor consultants throughout the program year. The objectives of the service are to:

- Clarify/amplify INPUT vendor data
- Provide telephone consultation
- Fulfill "short-term" vendor research needs (requiring fewer than 2 hours of research)

Approximately 40 hours per year per client are reserved for these services; this allotment can be increased at an additional fee.

ACCESS TO VENDOR INFORMATION CENTRES

You may access any of INPUT's Information Centres (London, California, Washington, D C., and New Jersey). The London facility houses more than 50 trade publications, files on more than 500 information services vendors, and INPUT's industry and application files.

ANNUAL CONFERENCE

All INPUT forecasts will be presented and discussed; the competitive environment will be analysed. Clients can attend at a reduced fee.

TYPES OF VENDORS COVERED

- Professional Services Vendors
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations
- Systems Integration Vendors
- Applications Software Vendors
- Systems Software Vendors
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools
- Processing Services Vendors
  - Transaction Services
  - Utility Services
  - Other Processing Services
- Network Services Vendors
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information Services
- Communications Services Vendors
- Turnkey Systems Vendors
- Third-Party Maintenance Vendors

INPUT also has a Vendor Analysis Programme that covers the U.S. Information Services Industry.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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INPUT®

1989 VENDOR ANALYSIS PROGRAM

1989 Vendor Analysis Program (VAP)

PROGRAM DESCRIPTION

VENDOR "HOTLINE" SERVICE
• Information Services Vendors • Public/Private Companies, Divisions • U.S. and Canada
VENDOR PROFILES
• Information Services Vendors • U.S. and Canada • Company Background/Financial History • Products and Services • Revenue and Employees • Revenue Distribution by Service Mode
VENDOR INFORMATION CENTER
• California Center • New Jersey Center • Washington, D.C. Center
ANNUAL CONFERENCE

VENDOR PROFILES

Accurate, concise analyses of public and private information services vendors are the cornerstone of VAP. The 1989 profiles will focus on small, emerging companies, private companies, and prominent divisions of larger companies.

Vendor Profiles include:

- General Information (company name, address, telephone, CEO name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- 5-year financial summary
- Key products and services
- Industry markets served
- Geographic markets served
- Information systems (hardware and software) capability
- And more

Vendor profiles are based on research conducted by INPUT; clients receive shipments monthly.

Renewal Agreement

INPUT's Vendor Analysis Program (VAP)

To: INPUT, 1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300

Yes! Please renew our subscription to INPUT's Vendor Analysis Program (VAP) at the fee of $9,500.

TERM OF SUBSCRIPTION

The initial term of this subscription will begin January 1, 1989 and end December 31, 1989. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

Subscription fee payment in full covers lease of all Vendor Profiles, Vendor Briefs and Vendor Data Base materials for term of the subscription. Unless subscription is renewed, all of same materials must be returned to INPUT within ten (10) days of end of subscription period.

EARLY RENEWAL DISCOUNT—A 2% discount may be deducted from the total amount of order if payment received by November 1, 1988.

TERMS OF PAYMENT

Payment in full is due within 30 days of invoice date.

- ☐ Enclosed is my check in the amount of $______________.
- ☐ Bill my company on purchase order number ______________ in the amount of $__________.

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

Authorized By:

____
Client Organization

____
Address

____

____
Signature

____
Name

____
Title

____
Telephone Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

1288S 8/88

INPUT®

VENDOR "HOTLINE" SERVICE

VAP clients receive continuous support from INPUT's information services vendor consultants throughout the program year. The objectives of the service are to:

- Clarify/amplify VAP vendor data
- Provide telephone consultation
- Fulfill "short-term" vendor research needs (requiring fewer than 2 hours of research)

Approximately 40 hours per year per client are reserved for "Hotline" services; this allotment can be increased at an additional fee.

ACCESS TO VENDOR INFORMATION CENTERS

You may access any of INPUT's Information Centers (CA, NJ, DC, UK). The California facility houses more than 150 trade publications, files on more than 4,000 information services vendors, more than 300 industry/application files, and all INPUT studies conducted for general release.

ANNUAL ALL-CLIENT CONFERENCE

All INPUT forecasts will be presented and discussed; the competitive environment will be analyzed.

TYPES OF VENDORS COVERED

- Systems Integration Vendors
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  - Software Development
  - Systems Operations
- Applications Software Vendors
- Systems Software Vendors
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools
- Processing Services Vendors
  - Transaction Services
  - Utility Services
  - Other Processing Services
- Network Services Vendors
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information Services
- Communications Services Vendors
- Turnkey Systems Vendors
- Third-Party Maintenance Vendors

The Vendor Analysis Program (VAP) was formerly titled Company Analysis and Monitoring Service (CAMS).

About INPUT®

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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1990 MATERIAL

About INPUT®

Market Intelligence and Strategic Planning Services

About INPUT

Company Profile

INPUT provides planning information, analysis, and recommendations to managers and executives in the information services industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software products, processing and network services, systems management, and systems/software maintenance and support).

Many of INPUT's professional staff have more than 20 years' experience in their areas of specialization. Most have held management positions in large organizations, enabling them to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Staff Credentials

INPUT's staff have been selected for their broad background in a variety of functions, including planning, marketing, operations, and information processing. Many of INPUT's professional staff have held executive positions in some of the world's leading organizations, both as vendors and users of information services, in areas such as the following:

- Processing Services
- Professional Services
- Turnkey Systems
- Applications Software
- Field (customer) Service
- Banking and Finance
- Insurance
- Process Manufacturing
- Telecommunications
- Federal Government

Educational backgrounds include both technical and business specializations, and many INPUT staff hold advanced degrees.

U.S. and European Advisory Services

INPUT offers the following advisory services on an annual subscription basis.

1. Market Analysis Program—U.S.
The Market Analysis Program provides up-to-date U.S. information services market analyses, five-year forecasts, trend analyses, vertical/cross-industry market reports, an on-site presentation, hotline inquiry service, and sound recommendations for action. It covers software products, turnkey systems, processing and network services, and

professional services markets. It is designed to satisfy the planning and marketing requirements of current and potential information services vendors.

2. Market Analysis Program—Europe
This program is designed to help vendors of software and services with their market planning. It examines the issues in the marketplace, from both a user and a vendor viewpoint. It provides detailed five-year market forecasts to help plan for future growth.

3. Vendor Analysis Program—U.S.
A comprehensive reference service covering more than 400 U.S. information services vendor organizations, VAP is often used for competitive analysis and prescreening of acquisition and joint-venture candidates. Profiles on leading vendors are updated regularly, and hotline inquiry service is provided.

4. Vendor Analysis Program—Europe
This is an invaluable service for gaining competitive information. Two binders are provided—one is a directory listing names, addresses, and turnover of some 700 European software and services vendors. The second binder contains profiles of about 300 key vendors.

5. Electronic Data Interchange Program
Focusing on what is fast becoming a major computer/communications market opportunity, this program keeps you well informed. Through monthly newsletters, timely news flashes, comprehensive studies, and telephone inquiry privileges, you will be informed and stay informed about the events and issues impacting this burgeoning market.

6. Network Services Program—Europe
Network services is a fast-growing area of the software and services industry. This program is essential to vendors of EDI, electronic information services, and network products and services. It keeps clients informed of the latest developments and includes a monthly newsletter on EDI.

7. Systems Integration Program—U.S.
Focus is on the fast-moving world of systems integration and the provision of complex information systems requiring vendor management and installation of multiple products and services. The program includes an annual market analysis of the U.S. systems integration market, SI vendor profiles and updates, topical market analysis reports, and an annual SI seminar.

8. Systems Operations Program—U.S.
This program focuses on the exciting resurgence of the market for outsourcing systems operations. It includes an annual market analysis report of the systems operations market, SO vendor profiles and updates, topical market analysis reports, and an annual SO seminar.

9. Systems Management Program—Europe
Systems integration and systems operations (facilities management) are key growth areas for the decade. This program examines these two areas and analyzes current market trends, user needs, and vendor offerings.

10. Federal Information Systems and Services Program
This program presents highly specific information on U.S. federal government procurement practices, identifies information services vendor opportunities, and provides guidance from INPUT's experienced Washington professionals to help clients maximize sales effectiveness in the federal government marketplace.

11. State Information Systems and Services Program (proposed)
This program presents extensive information on state government spending, procurement policies, identifies key contacts, opportunities, and provides guidance from INPUT's experienced professionals to help clients maximize sales opportunities in the state government marketplace.

12. Information Systems Program
ISP is designed for executives of large information systems organizations and provides crucial information for planning, procurement, and management decision making. This program is widely used by both user and vendor organizations.

13. Customer Service Program—International
This program provides customer service organization management with data and analyses needed for marketing, technical, financial, and organizational planning. The program pinpoints user perceptions of service received, presents vendor-by-vendor service comparisons, and analyzes and forecasts service markets for large systems, minicomputers, personal computer systems, and third-party maintenance. A monthly newsletter helps clients keep informed of the latest developments in the market.

14. Customer Service Program—Europe
Customer service is an expanding area. Companies are now expanding from hardware service to more software-related maintenance and professional services. This program helps vendors penetrate these new areas and provides guidelines for future market strategy. A monthly newsletter helps clients keep abreast of the latest developments in the market.

15. Worldwide Information Services Market Forecasts
In 1989 INPUT initiated this research study, which provides an international forecast for the information services market.

Customized Advisory Services

In addition to standard continuous-information programs, INPUT will work with you to develop and provide a customized advisory service that meets your unique requirements.

Acquisition Services

INPUT also offers acquisition services that are tailor-made for your requirements. INPUT's years of experience and data base of company information about information systems and services companies have helped many companies in their acquisition processes.

An Effective Combination

INPUT'S Executive Advisory Services are built on an effective combination of research-based studies, client meetings, informative conferences, and continuous client support. Each service is designed to deliver the information you need in the form most useful to you, the client. Executive Advisory Services are composed of *varied combinations of the following products and services:*

Research-Based Studies
Following a proven research methodology, INPUT conducts major research studies throughout each program year. Each year INPUT selects issues of concern to management. Topical reports are prepared and delivered throughout the calendar year.

Information Service Industry Reports
INPUT's Executive Advisory Services address specific issues, competitive environments, and user expenditures relative to:

- Software Products
- Processing Services
- Network Services
- Systems Integration
- Systems Operations
- Professional Services
- Turnkey Systems
- Small-Systems Service
- Third-Party Maintenance
- Large-Systems Service

Industry-Specific Market Reports
Detailed analyses of market trends, forces driving the markets, problems, opportunities, and user expenditures are available for the following sectors:

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Telecommunications
- Retail Distribution
- Wholesale Distribution
- Banking and Finance
- Insurance
- Medical
- Education
- Business Services
- Consumer Services
- Federal Government
- State and Local Government
- Miscellaneous Industries

Cross-Industry Market Report
A separate analysis covers the following cross-industry application areas:

- Accounting
- Education and Training
- Engineering and Scientific
- Human Resources
- Office Systems
- Planning and Analysis
- Other Cross-Industry Sectors

Hotline: Client Inquiry Services
Inquiries are answered quickly and completely through use of INPUT's Client Hotline. Clients may call any INPUT office (San Francisco, New York, Washington D.C., London, or Paris) during business hours or they may call a voicemail service to place questions after hours. This effective Hotline service is the cornerstone of every INPUT Executive Advisory Service.

The Information Center
One of the largest and most complete collections of information services industry data, the Information Center houses literally thousands of up-to-date files on vendors, industry markets, applications, current/emerging technologies, and more. Clients have complete access to the Information Center. In addition to the information contained in its files, the center maintains an 18-month inventory of over 130 major trade publications, vendor consultant manuals, economic data, government publications, and a variety of important industry documents.

Access to INPUT Professional Staff
Direct access to INPUT's staff, many of whom have more than 20 years of experience in the information industry, provides you with continuous research and planning support. When you buy INPUT, you buy experience and knowledge.

Client Conference
You can attend INPUT's Client Conference. This event addresses the status and future of the information services industry, the competitive environment, important industry trends potentially affecting your business, the impact of new technology and new service offerings, and more.

You will attend with top executives from many of the industry's leading, fastest-growing, and most successful vendor companies—and with top Information Systems (IS) managers from some of the world's most sophisticated user organizations.

On-Site Presentation by INPUT Executives
Many of INPUT's programs offer an informative presentation at your site. Covering the year's research, this session is scheduled at the convenience of the client.

Proprietary Research Service

INPUT conducts proprietary research that meets the unique requirements of an individual client. INPUT's custom research is effectively used:

For Business Planning
Planning for new products, planning for business startups, planning for expansion of an existing business or product line—each plan requires reliable information and analysis to support major decisions. INPUT's dedicated efforts and custom research expertise in business planning ensure comprehensive identification and analysis of the many factors affecting the final decision.

For Acquisition Planning
Successful acquisition and divestiture of information services companies requires reliable information. Through constant contact with information services vendor organizations and continuous tracking of company size, growth, financials, and management "chemistry," INPUT can provide the valuable insight and analysis you need to select the most suitable candidates.

For the Total Acquisition Process
INPUT has the credentials, the data base of company information, and—most importantly—the contacts to assist you with total acquisition and/or partnering relationship processes:

- Due Diligence
- Schedules and Introduction
- Criteria & Definitions
- Retainer and Fee-Based
- Active Search

For Competitive Analysis
Knowing marketing and sales tactics, product capabilities, strategic objectives, competitive postures, and strengths and weaknesses of your competition is as critical as knowing your own. The career experience of INPUT's professionals—coupled with INPUT's collection and maintenance of current financial, strategic, tactical, and operational information about more than 400 active companies—uniquely qualifies INPUT to provide the best competitive information available today.

For Market and Product Analysis
Developing new products and entering new markets involves considerable investment and risk. INPUT regularly conducts research for clients to identify product requirements, market dynamics, and market growth.

More About INPUT...

- More than 5,000 organizations, worldwide, have charted business directions based on INPUT's research and analysis.

- Many clients invest more than $50,000 each year to receive INPUT's recommendations and planning information.

- INPUT regularly conducts proprietary research for some of the largest companies in the world.

- INPUT has developed and maintains one of the most complete information industry libraries in the world (access is granted to all INPUT clients).

- INPUT clients control an estimated 70% of the total information industry market.

- INPUT analyses and forecasts are founded upon years of practical experience, knowledge of historical industry performance, continuous tracking of day-to-day industry events, knowledge of user and vendor plans, and business savvy.

- INPUT analysts accurately predicted the growth of the information services market—at a time when most research organizations deemed it a transient market. INPUT predicted the growth of the microcomputer market in 1980 and accurately forecasted its slowdown in 1984.

For More Information . . .

INPUT offers products and services that can improve productivity, and ultimately profit, in your firm. Please give us a call today. Our representatives will be happy to send you further information on INPUT services or to arrange a formal presentation at your offices.

For details on delivery schedules, client service entitlement, or Hotline support, simply call your nearest INPUT office. Our customer support group will be available to answer your questions.

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Planning Services for Management

FIRST CLASS

INSIDE

How to keep up with
changing data management
technology...

INPUT®

Are You Ready for Outsourcing . . . ?

- How can you make the Go/No Go decision?
- What are the rewards? The pitfalls?
- How big is the market?
- What kinds of companies have succeeded best?
- How should you structure outsourcing relationships?
- How will outsourcing change your organization?

Get Ready—Get the Answers—With INPUT's New Report!

The potential rewards of outsourcing are tremendous. But so are the risks. A new report from INPUT entitled *Information Systems and Outsourcing—A Strategic Assessment* puts outsourcing in perspective by giving IS management and vendors a crisp analysis of risk and reward potential *in the context of today's information environment!*

Analyses of the major outsourcing vendors, the increasing role of professional services, contract and personnel pitfalls, market size and growth rates, and a comprehensive conceptual framework IS management can use to evaluate outsourcing on a case-by-case basis—these are all provided by INPUT's report. But the report also covers a historical perspective on outsourcing, major market forces, vendor selection criteria, organizational impacts, analyses of vendors and their strategies, and more.

Information Systems and Outsourcing A Strategic Assessment
Outsourcing—Past and Present
• A Historical Perspective • What Is Different • A Working Definition
Information Systems Perspectives
• Driving Forces • IS Organization in the 1990s • Information Systems Strategy and Outsourcing • Outsourcing Opportunities
Outsourcing and Vendor Capabilities
• Vendor Categorization • Systems Operations and Systems Integration • Vendor Support for Organizational Issues • Vendor Capabilities • Outsourcing and Systems Management
Outsourcing—Decision and Selection
• Outsourcing Decision Factors • Client/Vendor Relationship • Vendor Selection • Managing the Vendor • Organizational Impacts • Insourcing • Information Systems Outsourcing Benefits
Conclusions and Recommendations

And if you act before September 30, 1990, you'll pay $150 less than the regular list price for the report—a savings of 10 percent!

There is no question that outsourcing represents a major shift in focus for both vendors and users. The only question is who will benefit most. We believe that to exploit the outsourcing opportunity requires the most comprehensive information and the best analysis available. *Information Systems and Outsourcing—A Strategic Assessment* is researched and written to give you exactly that.

Adding Value

Ever since Kodak contracted out for the majority of its information systems function, companies have been wondering how they might reconfigure their IS effort to allow them to concentrate on the area where they add the most value: the architecture, planning, and implementation of strategic systems. INPUT's report tackles that issue, along with others like:

- What are the key benefits to be derived from the five basic categories of outsourcing?
- What are the various types of outsourcing relationships and what are their advantages and disadvantages?
- What are the pitfalls in managing the ongoing vendor relationship?
- What are the key factors in analyzing whether you should outsource?
- What kind of organizational impacts can you expect from an outsourcing relationship?
- How can you define *business* objectives for outsourcing relationships?
- How can you structure these agreements to give your company the greatest possible benefit?
- How can you resolve the inherent conflict in the perspectives of the organization and the IS department?
- How will the major market forces of globalization, increasing rate of business change, and specialization affect the outsourcing trend?

In short, INPUT's report examines all of the pressures related to outsourcing, and analyzes in detail how they are likely to transform the IS organization in the 1990s.

The Vendor View

But INPUT does not stop there. Our researchers also provide valuable information on outsourcing vendors, the market they play in, and how their product and service offerings are being forced to evolve. The report answers your questions about:

- How big is the market now, how fast is it growing, and how big will it be for each of the next five years?
- What are the outsourcing strategies of eight key competitors in this field?
- How do outsourcing buyers rate various vendor capabilities in order of importance?
- Where are the best outsourcing opportunities today? Where will they be in the near future? What are the forces driving the market in that direction?
- What types of outsourcing relationships are becoming common among users and vendors?
- How is the willingness of users and buyers to make longer-term commitments to outside vendors for larger contracts affecting the outsourcing market?

And other questions you have to have answered if you are going to be able to shape your business so that you can reap outsourcing's rewards.

Outsourcing Benefits

Outsourcing Category	Benefits						
	Costs		Skills Access	Rapid Response	Use of Skills		Management Time
	Oper.	Cap.			Vendor	IS	
Applications management	X	X	X	X	X	X	X
Systems operations	X	X	X	X			X
Transition management			X	X	X	X	X
Applications maintenance	X			X		X	X
Systems integration			X	X	X		X

THE FIVE BENEFITS of outsourcing are used to form a matrix with the five different outsourcing categories to help IS management determine where the best opportunities lie for their companies.

Clear, Practical Recommendations

Never has an issue had so much potential to change the way you do business. Never has an issue involved so many different aspects of information management. Never has an issue carried so many possible benefits, or had the potential for negative impacts.

Outsourcing is unique. And you can't just ignore it. IS managers and vendors are going to be forced to make a conscious decision on what to do about outsourcing.

That's why INPUT's report on *Information Systems and Outsourcing—A Strategic Assessment* can be so valuable for you. We put all of the resources of our sophisticated research infrastructure behind the effort to come up with information on this subject. And then we put some of the finest minds in the business to work on it to come up with incisive analysis and clear, practical recommendations for action.

Why not put this powerful research and analysis to work for you? Use the enclosed order form to order your copy of *Information Systems and Outsourcing—A Strategic Assessment* today.

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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INPUT®

If You Need the Best Available Analysis of Executive Information Systems Today . . .

- ▲ What are the New Ten Commandments of EIS?
- ▲ Who are the major players?
- ▲ What are the technological trends?
- ▲ How big is the market?
- ▲ How do you succeed with EIS?

. . . INPUT Can Put that Analysis at Your Fingertips Now!

A new INPUT report on Executive Information Systems clarifies the emerging opportunities and tremendous potential in this new, fast-growing, and sometimes confusing market.

And if you act before September 30, 1990, you can have the report for $60 less than the regular list price—a savings of 10 percent!

Executive Information Systems (EIS) are the vendor community's attempt to storm what has been a citadel of computer resistance—executive desktops.

The technological foundations of EIS have changed dramatically, with mainframe systems being supplanted by personal workstations, local and wide area network capabilities, and relational data bases with high-level programming tools. But the goal has remained essentially the same: to provide executives who are essentially computer illiterate with a flexible, easy-to-use tool for rapid, ad hoc access to information of all kinds.

Developments in Executive Information Systems
EIS—Past and Future
• Prior to 1990 • EIS—A Definition • After 1990
The User View
• Demographics • Status and Activity • Lessons Learned • Planning for the Next Wave • The Value of EIS
The Vendor View
• Market Structure • Key Software Vendors • The Changing Market • Market Forecast
Conclusions and Recommendations

EIS Answers

With INPUT's report on *Developments in Executive Information Systems*, users and vendors now have access to the results of a months-long, in-depth research effort designed specifically to determine the exact characteristics of the EIS arena, and how you can shape your development or marketing efforts to take advantage of the opportunities emerging there.

The report analyzes the following questions in detail:

- What are the new Ten Commandments of EIS development and marketing?
- Who are the new sponsors of EIS development, and who makes the purchase decisions?
- What are the relative degrees of importance given by users to 13 different subapplications and categories of data in EIS?
- In what specific ways does EIS differ from traditional systems, and how can you exploit tho[se] differences?
- What types of users are in the wings, how should you plan to meet their needs?
- What do users and sponsors say they want out of EIS?
- What job titles and functional areas use EIS today? How will that change over next 18 months?
- What is the relative importance of the goals of timeliness, quality of information, support of management process, and use of information technology, according to executive users?
- What are the typical development times for EIS?
- What is the initial total investment, including software and staff?
- Where are the trendlines headed in pricing?

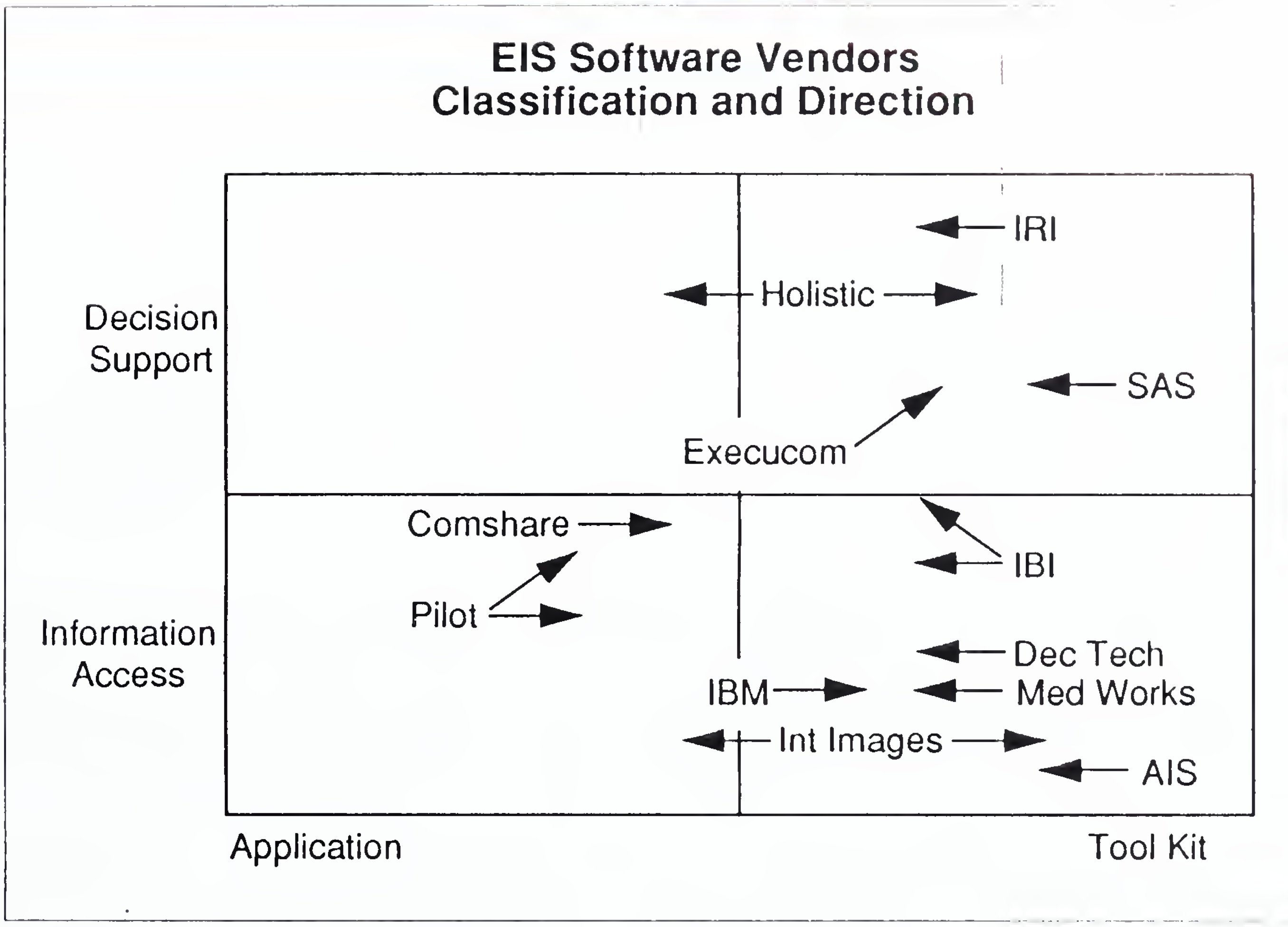
INPUT answers these and many of the other questions that will have a direct, practical bearing on your success in penetrating this final frontier of corporate computer use.

An Invaluable Guide

In addition to these specific issues, INPUT focuses its research in this report on some of the broader questions surrounding Executive Information Syste[ms]. The EIS market is in a constant state of upheaval because of the rapid technological developments that continue to change the basic platform, and because in the final analysis, EIS must be constantly adapted to fit

the requirements not of classes of users, but of individuals.

Developments in Executive Information Systems is an invaluable guide for vendors who need to understand the root causes of the market's changes, and how they can capitalize on them; and for users who need to understand the obstacles to EIS implementation. To determine where the technology is headed, INPUT deployed the resources of extensive mail surveys, broad telephone polls, and in-depth, focused telephone interviews of key participants. These survey results answer the following strategic questions:



THE FOCUS AND DIRECTION of the various major EIS vendors is instantly discernible in this diagram from Developments in Executive Information Systems. This is the kind of information that the report supplies on vendor analysis, product analysis, market analysis, and other issues central to your success.

- How is EIS technology changing? How does EIS compare to generalized cooperative processing?
- What is the size of the EIS user population within the typical company, and how will that change over the next five years?
- What are the obstacles to EIS success an how can they be overcome?
- How big is the EIS market now? How big will it get over the next five years? What are the compound annual growth rates of its components?
- How will the professional services component of EIS change over time, both in dollar value and in terms of the types of services required?
- Who are the key software vendors in this market? What are their products? Where are they positioned in the market? What are their strategies for increasing share?

Your Advantage

The EIS game has definitely changed. It is now a significant market, and it also shows definite potential to grow dramatically over the next five years. The EIS users who see the bigger picture; and the EIS vendors who shape their product and service offerings to take advantage of this bigger picture, are the ones who will succeed.

Be one of them. Order your copy of INPUT's *Developments in Executive Information Systems* today!

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INPUT®

How Will You Manage Data Effectively in the 1990s . . . ?

- How is RDBMS technology changing IS operations?
- How can you manage these changes? How will you address integrity and security issues? How will CASE affect you?
- How will the end user's increasing role affect you?

INPUT's New Report Tells You How!

Corporate data is a strategic weapon. If you want targeted intelligence on how changes in data management are changing the way you can use that weapon—and how it can be used against you—you need the best research you can find. You need INPUT's newest report on the world of data management.

Entitled *Data Base Systems Development*, the report addresses the changes sweeping the entire field of data management, showing how those changes will affect how you do business, and offering clear and concise recommendations for future action.

The report is based on a research effort that consumed hundreds of man-hours and tens of thousands of dollars. It is normally priced at $2,000.

Data Base Systems Development
Data Administration: Current Environment
• Background • Changing Environment • Effectiveness of Data Administration • Changing Role • Key Issues
Impacts of Relational Data Base Technology
• Status of Relational DBMS Use • Impacts of RDBMS on Data Administration • RDBMS and the End User
Impact of Other Technologies
• Distributed Data Base Technology • Impact of Network Growth • Role of the Data Dictionary • Data Administration and CASE
Data Management: Future Environment
• Data Management's Role in the Organization • Roadblocks to Success • Planning for the Future
Conclusions and Recommendations

But if you act before August 15, 1990, you'll pay the special price of $200 less than the regular list price for the report—a savings of 10 percent!

For this comprehensive overview and analysis, INPUT interviewed data base managers in Fortune 500 companies to find out directly the current status of data management organizations, DBMS environments, application development, and end-user roles.

This information is not theoretical. It is derived from direct interviews with the people in the data management trenches today. They know how changes in data management will affect your operations, because they're living through those changes in their own operations right now.

INPUT gives you the benefit of their hundreds of man years of experience to help you navigate one of the fastest changing fields in American business today. The report offers insights into how changes in data base management can affect you, including:

- How the overall strategy and direction of information systems in general, and data base management in particular, has serious implications for the scope of your responsibilities.

- How to approach concerns about the security and integrity of data files in a data environment rapidly changing over to distributed data base technology.

- How to decide when to make major technological investments in a market with some of the shortest product life cycles in the industry.

- How to accommodate increasing demand for data access, no matter where or in what format the data resides.

And more. The advent of relational data base technology has had a major impact on traditional data management techniques. And that impact has been amplified by the increasing availability of this sophisticated technology on every conceivable kind of computing platform—not just mainframes, but on departmental minicomputers and on desktop systems.

How do you deal with these changes?
How can you turn them to your advantage?
How will you be able to use the evolution of traditional data management roles to redefine the role of Information Systems?

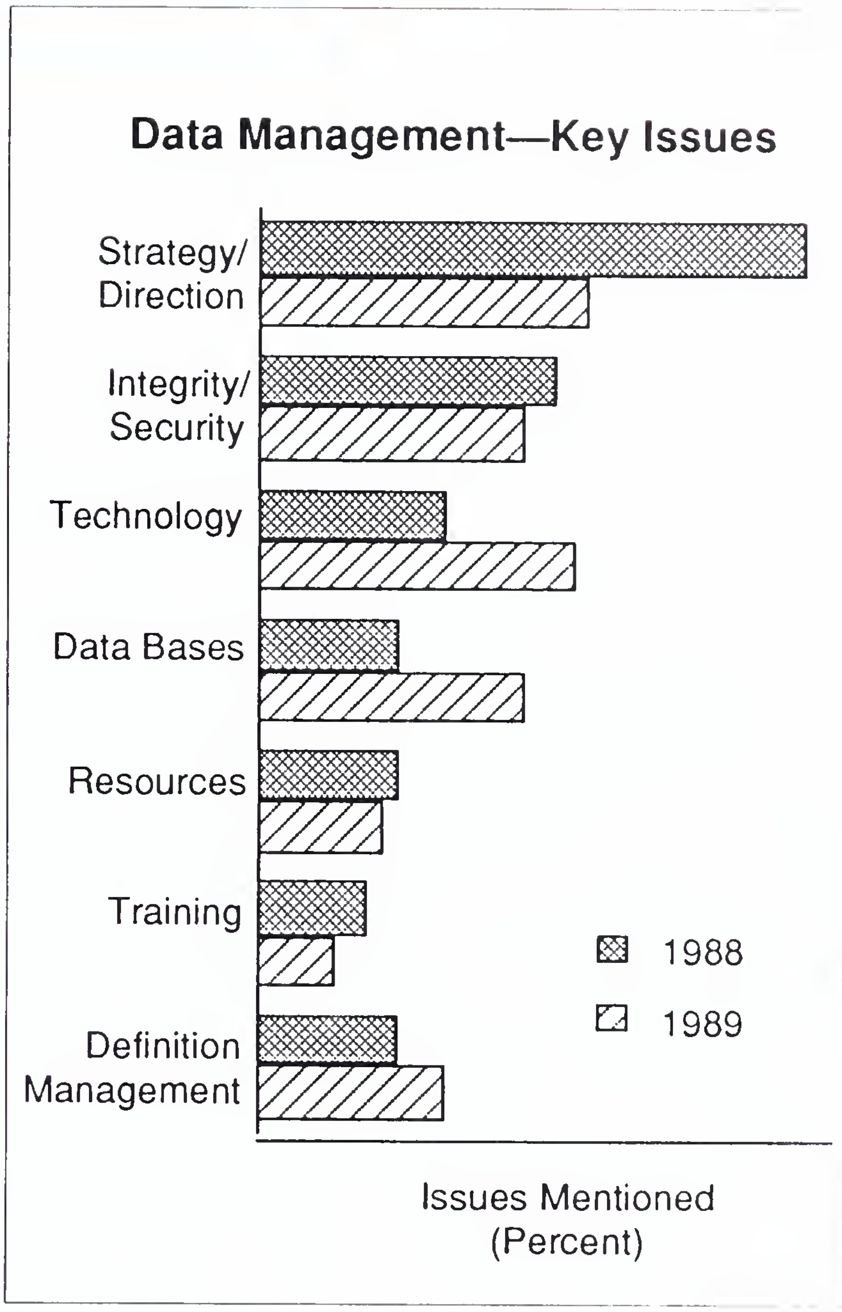
INPUT's report is a comprehensive examination of data management designed to help you do just that. It investigates in detail the questions that you are facing every day, and gives some straightforward recommendations on how to answer them:

- How do you best manage distributed data?
- What are the respective responsibilities of users and IS management for ownership of this data?
- How can you play a central role in managing both technology and growth?
- How do you plan for new technology, and how do you smoothly introduce it into existing environments?
- What role does corporate management play in supporting the data management process and how can you get them more involved?

There are also chapters on the impact of other data base technologies, the current environment for data administration, and the future of data management.

INPUT's *Data Base Systems Development* is written for managers in the data management trenches with responsibilities for managing a complex and rapidly changing technological and organizational evolution. It's filled with exhaustive research, insightful analysis, and clear recommendations. And we have a copy of the report waiting for you now.

All you have to do is fill out the enclosed order form and drop it in the mail today.



THESE ARE THE ISSUES singled out by the data managers interviewed for INPUT's report. The rapid technological and management changes in this area are evident in several responses.

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INPUT®

If You Need To Know How To Turn New Developments in EDI To Your Advantage...

- How is EDI being applied?
- What are users' concerns?
- How big is the market now and through 1995?
- Who are the leading EDI vendors?
- What sets their products and services apart?

... INPUT Shows You Where the EDI Opportunities Are!

The potential is that Electronic Data Interchange (EDI) could revolutionize every aspect of the way companies do business with each other.

But what exactly is happening in the EDI markets today and for the next five years? How fast will they grow? What forces are at work accelerating that growth? Slowing it down? How will they affect *your* company?

If you are an EDI vendor or user, the answers to these kinds of questions could have a dramatic impact on how you structure your own plans for growth over the next five years.

INPUT has published a new report entitled *The EDI Market, 1990-1995,* that is designed from the ground up to answer these questions.

The Electronic Data Interchange Market, 1990-1995
Background on EDI
EDI Input-Output Analysis
• Definition and Relevance • EDI Input-Output Matrix • Implications of Input-Output analysis
Market Size and Forecast
EDI Market Trends
• Software Products • Network Services • Professional Service Trends
EDI Trading Communities and Applications
• Automobile Manufacturing • Paper, Printing, and Publishing Industries • Retail, Apparel, and Textile Industries • Etc.
Conclusions and Recommendations

And if you act before November 19, 1990, and buy just this report, you'll pay $300 less than the regular list price for the report—a savings of 10 percent on targeted market intelligence that could change the way you do business!

INPUT is also publishing a report that complements this report's total-market focus. Entitled *EDI: Business Integration Issues,* this second report focuses on the practical questions of how individual businesses have solved the problems of EDI integration in the real world.

And if you buy that report too, you can save an additional 10 percent off the total price for the two reports.
A 20 percent savings for the complete picture!

EDI could transform companies' relationships with large vendors, with large customers, with banks, insurance companies, and firms at every level of t' product development, manufacturing, and distribu..on chain. And that will create tremendous opportunities for people with the right information.

A Unique Analytical Tool

INPUT's report gives you that information. The result of more than a man-year of primary research into every aspect of electronic data interchange, *The EDI Market, 1990-1995* gives EDI marketers and users unique insights into where this rapidly changing technology is headed *and why*. The report tells you:

- How big the market for EDI network services, software, and professional services is now, and how fast it will grow over the next five years.
- Who the leading EDI vendors are, and why their products and services have been embraced by the marketplace.
- Where the new market and product opportunities will be.
- What the dominant user trends are in EDI adoption, including what users say their reasons for implementation are, what kind of platforms they are using, how they are reconciling parallel paper a electronic systems, and more.

The report also introduces a unique analytical tool called the EDI Input-Output Matrix. Using this matrix, vendors and users can focus on the issues that will have the greatest impact on their operations and overall profitability, clearly analyze the costs and benefits, and come to a rational conclusion regarding where EDI can give them a competitive advantage.

Creating Competitive Advantage

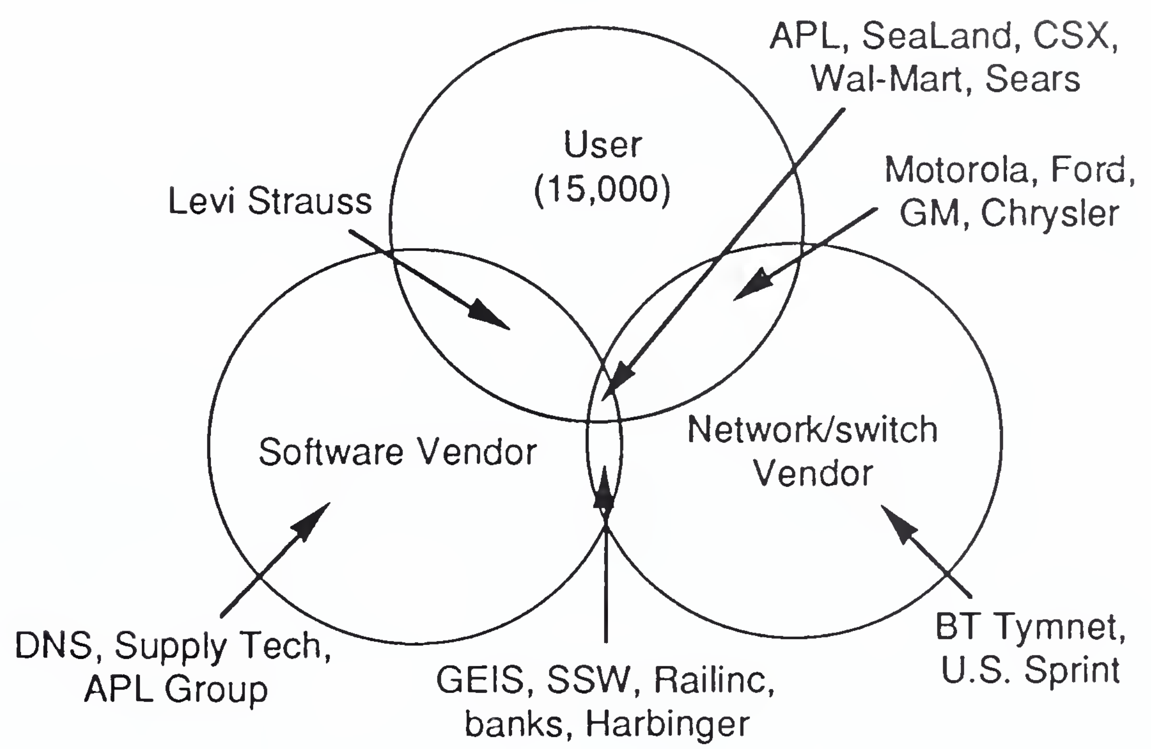
The report does not stop with these issues. *The EDI Market, 1990-1995* is a compendium of research that touches literally every significant aspect of this revolutionary technology:

- What impacts can be anticipated from EDI server architectures?
- What role will value-added networks play in the future?
- How will the "Hub-and Spoke" phenomenon affect users' choices and vendors' product offerings?
- Where is the three-tiered market for message-switching software headed?
- How will market consolidation affect providers of network services?
- Where are the opportunities in education and training?
- What are the major industries adopting EDI?
- How are their demands pushing development of real-time EDI and other advanced services?

Plus detailed case studies of institutions that have adopted EDI, analysis of future market and technical directions, and a set of in-depth recommendations for the major EDI constituencies (users and vendors).

Companies that want to take advantage of developments in EDI need the best market intelligence available. They need detailed analysis based on new primary research into every major facet of this potentially revolutionary technology.

Players in the EDI Market Wear Many Hats



EDI SERVICES AND SOFTWARE are provided by third party vendors as well as large hub users as shown in this exhibit from *The EDI Market, 1990-1995.*

That is what INPUT's *The EDI Market, 1990-1995* gives you. It gives you the best data and analysis available.

It gives you a tool for building competitive advantage.

Use the enclosed order form to order your copy today and save 10 percent off the regular purchase price. Or buy the companion volume on *EDI: Business Integration Issues* too, and save 20 percent.

Do it now. Reliable information is the key to your success.

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INPUT

If You Have Questions about Success in the Turnkey Systems Markets . . .

- ➤ How are standards changing the marketing rules?
- ➤ How big are these markets? How fast are they growing?
- ➤ How can marketers avoid the commodity-pricing crunch?
- ➤ Are support services a competitive advantage?
- ➤ Which vendors are succeeding, and why?

...INPUT Can Give You the Answers!

To make the right decisions in turnkey systems markets these days, you have to have targeted intelligence on market size and growth rates, major trends, and successful vendor strategies.

INPUT's new report on *U.S. Turnkey Systems Markets, 1989-1994*, a powerful competitive weapon, gives you all of that market intelligence, and more.

And if you act before May 15, 1990, you'll pay $250 less than the regular list price for the report—a savings of 10%!

U.S. Turnkey Systems Markets 1989-1994
Market Size and Forecast
Issues and Trends
Value-Added Reseller Survey
• Hardware/Software Platform Support • Selection Criteria • Platform Vendor Support Characteristics • Distribution Channel Conflict • Value-Added Product Features • Product Support Provided by Turnkey Systems Vendors • Marketing Approach • Geographical Markets • Product Expansion Plans • VAR Market Issues • Successful Turnkey Systems Strategies • Profitability and Revenue Growth • Competition
Competitive Environment
Supporting VARS
Conclusions and Recommendations

The report is a distillation of months of research designed to help turnkey systems companies shape successful business strategies by answering crucial questions about their markets:

- How large will the turnkey systems markets be in five years, and how fast are they growing?
- What are the aggregate revenues of turnkey systems vendors by company size, and what are their growth rates?
- What are the fastest growing segments of the turnkey systems markets, by mode of delivery and by product and service components? Which segments are growing slowest?
- What are the relative sizes and growth rates for industry-specific and cross-industry markets?
- Exactly how large a share of the total market is accounted for by network services? By application software? By professional services?

This market data alone would be a powerful argument for obtaining INPUT's report. But we give you even more.

Market Trends, Vendor Profiles

The turnkey systems markets have been in a state of flux recently, reacting to major technological and business trends. *U.S. Turnkey Systems Markets, 1989-1994*, tracks those trends for you, analyzing how they are developing and how they are likely to affect your business:

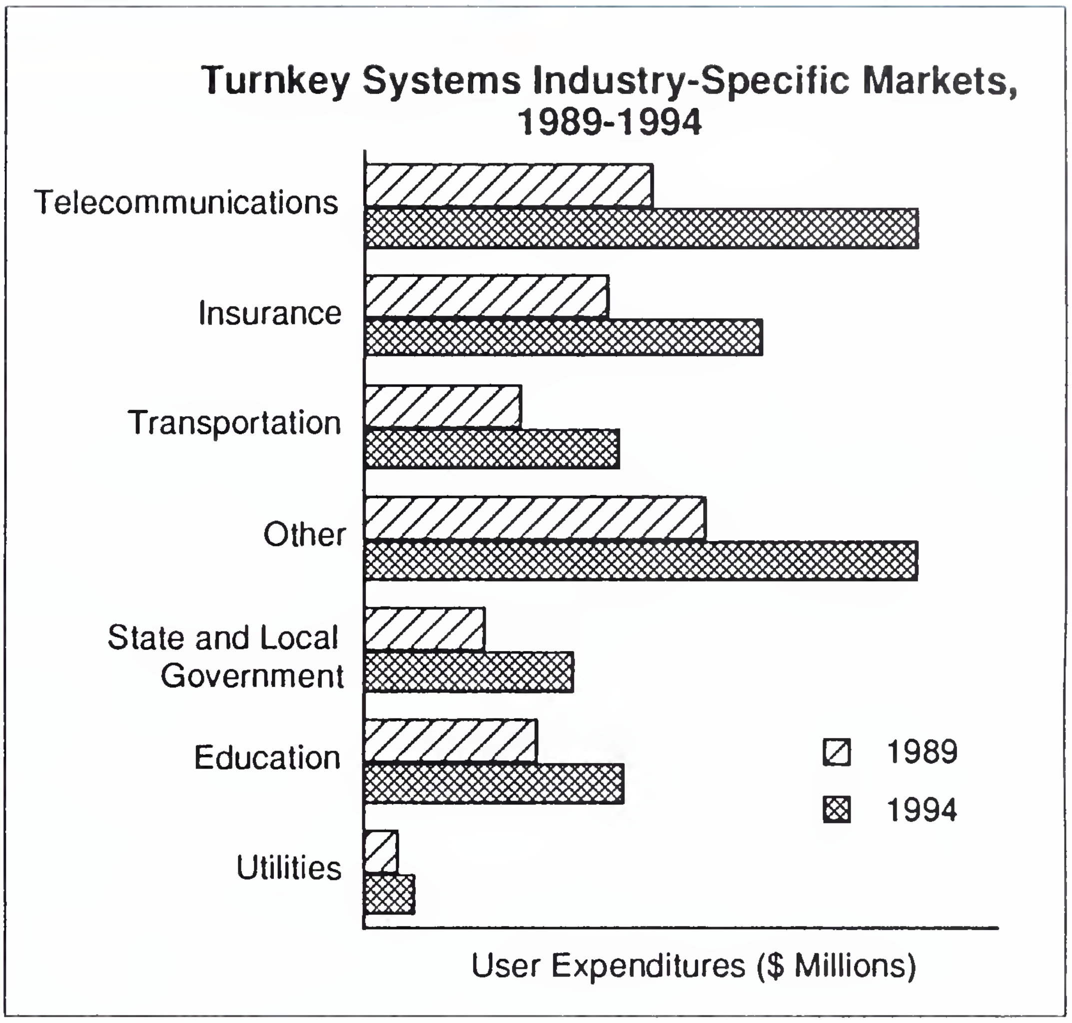
- Standardization has opened doors to growth, at the same time as it has put tremendous downward pressure on platform prices. INPUT examines how you can turn these contrary forces to your advantage.
- Channel conflict has become a major challenge for turnkey systems vendors. INPUT shows how some innovative lead-distribution and joint-marketing programs are turning conflicts into profitable collaborations.
- Tiered pricing offers advantages and disadvantages to almost every link in the distribution chain. INPUT analyzes the pros and cons for all parties.

- Cross-matching is one strategy for broadening your product offerings. INPUT points out some benefits, and some little-known pitfalls.

These are only a few of the trends treated in detail. Others include product and service extensions, strategic alliances, cooperation with consultants, gray market competition, and more.

In addition to market trends, INPUT's report also provides a thorough analysis of the competitive environment, including detailed analyses of the major players in the market:

- Who are the leading turnkey systems vendors?
- What strategies work best in this market for sales? For distribution?
- What do Autodesk, WordPerfect Corp., Neuron Data, Sybase, and other successful vendors have in common?



USER EXPENDITURES for turnkey systems vary widely across various industries. INPUT's report pinpoints the size and growth rates of these expenditures for you.

- How important are reliability, product quality, product availability, and open systems architecture for turnkey systems products?
- How have the stocks of public turnkey systems companies performed in the recent past?
- What are the products of major market players?
- What have their revenues been over the past three years?
- What are their geographic markets, their industry markets, their hardware platforms, their service and warranty policies?

And much more about the companies that in many cases are leading the changes sweeping these markets.

How those changes affect your company is up to you. You will make the decisions. How informed those decisions are will depend on the quality of the market intelligence you can get. INPUT gives you the best.

INPUT's *U.S. Turnkey Systems Markets, 1989-1994*, puts the resources of one of the most respected authorities on turnkey systems at your fingertips. It gives you the answers you need.

So get the market intelligence you have to have, and save 10 percent off regular list price. Use the enclosed order form to order your copy today!

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INPUT®

If You Compete in the Processing Services Markets. . .

- What is the market's overall size and growth rate?
- Which segments of the market are growing fastest? Slowest?
- How are user demands changing processing services?
- What successful strategies are other vendors using?
- What do their five-year financials look like?

INPUT's Processing Services Market Survey Can Give You the Edge You Need

It's a market that continues to astound the nay-sayers. For years, people have said processing services were dead. And for years, processing services vendors have had an unbroken record of profitable growth.

INPUT has just published a report that gives you carefully researched, up-to-the-minute information on what's going on in processing services, and how you can be sure to participate in the market's steady growth.

U.S. Processing Services Markets 1989-1994
Processing Services
• Issues and Trends • Market Forecasts • Mergers and Acquisitions
Transaction Processing Services
• Overview • Sector Markets
Utility Processing Services
• Issues and Trends • Market Forecasts
Other Processing Services
• Issues and Trends • Market Forecasts
Systems Operations
• Issues and Trends • Market Forecasts • Competitive Environment
Vendor Activities and Profiles
• Vendor Activities • Public Company Performance • Vendor Profiles

And if you act before June 15, 1990, you'll pay $250 less than the regular list price for the report—a savings of 10%!

The report, *U.S. Processing Services Markets, 1989-1994*, provides in-depth analyses of the trends and market forces shaping the future growth of four different processing services markets:

- **Transaction Processing Services,** in seven of the fastest growing vertical markets: discrete manufacturing, banking and finance, insurance, medical, telecommunications, transportation, and human resources
- **Utility Processing Services,** generalized services customers use to perform a range of processing and to develop and run custom programs
- **Other Processing Services,** including specialized services like output microfilm, disaster recovery, and scanning
- **Systems Operations,** facilities management using vendor-supplied systems

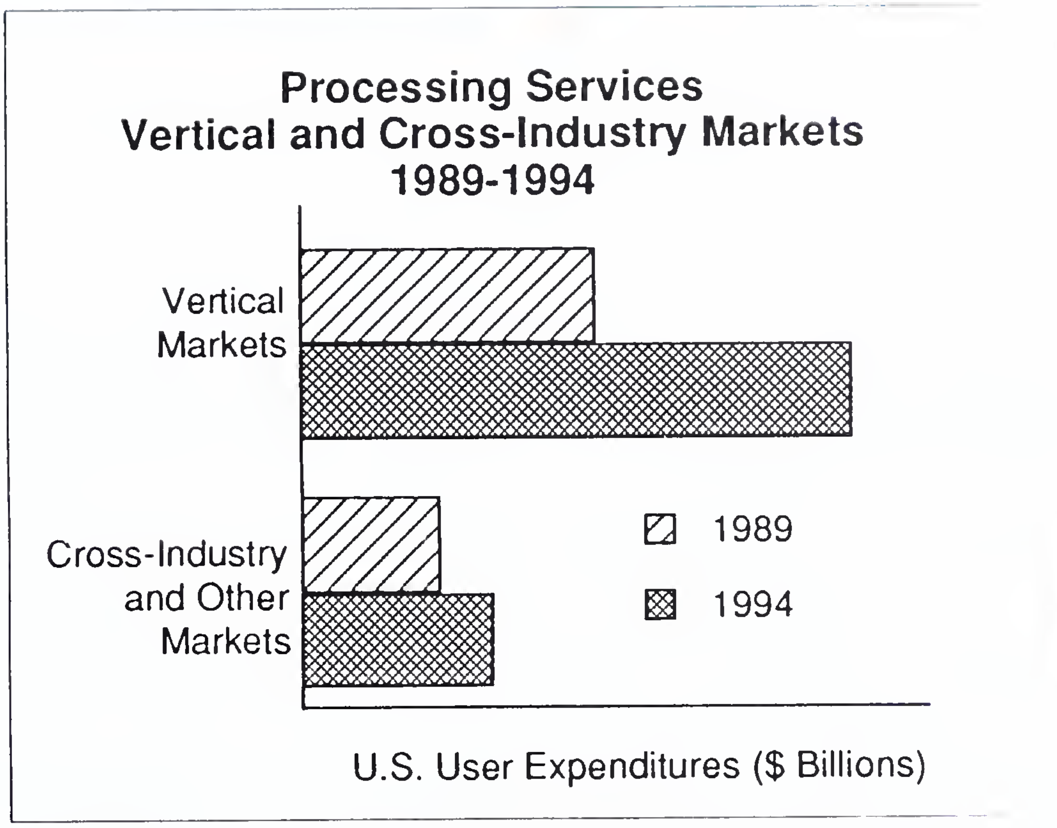
For each of these service delivery modes, INPUT's survey gives a five-year market forecast, investigates the forces acting on the market to enhance or inhibit its growth, and analyzes leading vendors' product offerings, strategies, and financial profiles.

The report answers the following kinds of questions:

- What role has the demand for innovative industry-specific applications had in shaping today's services vendors?
- How is the trend toward outsourcing growing, and how can vendors take advantage of the success enjoyed by IBM, EDS, and Litton?
- Why has the development of PCs and high-powered workstations not killed demand for processing services?
- How are vendors addressing customer objections about lack of control?

- How will international restrictions on transborder data flow affect the globalization of the processing services industry?
- Why have some vendors failed to adequately control the costs of processing services?
- How are vendors expanding their product mix to include software products, turnkey systems, systems integration, and professional services?

And more...



THE SHIFT AWAY from cross-industry processing services to services more closely targeted to specific vertical markets is clear in this graph from INPUT's newest survey of the processing services markets.

Comprehensive

In addition to thoughtful analyses of large-scale issues and market trends, INPUT's research staff spent hundreds of hours putting together one of the most comprehensive and authoritative collections of market survey data ever gathered for processing services.

INPUT's data base gives vendors a long look into how the size and growth rates of significant markets and vendors are changing, including:

- How will the annual growth percentages (nominal, deflator, and real) change over the next five years?
- How will the relative rankings of back-office processing, credit card processing, and credit authorization change in the banking industry over the next five years?
- How will the massive expenditures on turnkey systems open the market for systems operation services in the medical market?
- What are the industry and geographic markets of the largest processing services vendors?
- What are their various revenue sources?
- What are their key products and services?

Will ISDN be a help or a hindrance to processing services providers? How can mergers and acquisitions affect your performance? How will your company exploit the tremendous opportunities afforded by consumer processing services?

INPUT's report, *U.S. Processing Services Markets, 1989-1994*, gives you the answers that can provide a competitive edge in processing services.

Use the enclosed form to order your copy today!

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to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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INPUT®

Professionals Who Need The Best Available Analysis of Government Software and Services Markets...

- ▲ Critical intelligence on future trends
- ▲ Acquisition criteria and methods
- ▲ Certification pitfalls
- ▲ The move toward standardization
- ▲ Competition

...Need INPUT's Survey of the Federal

INPUT has just released the best, most up-to-date, and most comprehensive guide to the complex market for government software and services money can buy.

And if you act before February 28, 1990, you'll pay $150 less than the standard list price— a savings of 10%!

Federal Software and Related Services Market, 1989-1994
• Market Analysis and Forecast • Federal Requirements and Trends • Competitive Trends
Agency Perspectives
• Changes in Product/Service Acquisitions • Hardware Platforms • Selection Criteria • Agency Use of Ada • Software Technology Trends • Fourth-Generation Languages • Artificial Intelligence • Impact of Standards and Certification • Acquisition Methods • Testing and Acceptance Procedures • Follow-On Support
Vendor Perspectives
• Vendor Market Participation • Market Perceptions • Selection Criteria • Trends for Specific Products • Factors Impacting the Market • Marketing Strategies

A completely updated revision of the acknowledged "bible" of government software and services marketers, INPUT's report on the *Federal Software and Related Services Market, 1989-1994* is packed with the information you've got to have to make your marketing plans work.

Critical intelligence on trends, agency activity, acquisition criteria and methods, testing and acceptance procedures, competition— the report analyzes all of the factors that define the competitive edge in your business.

And that's not all...

The report also:

- Analyzes the wide-ranging impacts of increased functionality in off-the-shelf packaged softwar-
- Investigates the increasing perception of agency requirements as having more similarities than differences;
- Details the demands that the government do more with less;
- Highlights current and future plans for agencies' use of Ada;
- Examines the larger impacts of CASE tools, artificial intelligence, UNIX, and other technological developments on the government market as a whole.

And more...

But most important, the report puts all of this information and analysis in the context of how larger government market trends will affect the strategies of software and services marketers— today, and in the immediate future.

INPUT

Software and Related Services Market

Tremendous Potential

The 1989 market is already large: $1.97 billion. But by 1994, it is projected to reach $3.8 billion, a compound annual growth rate of 11%.

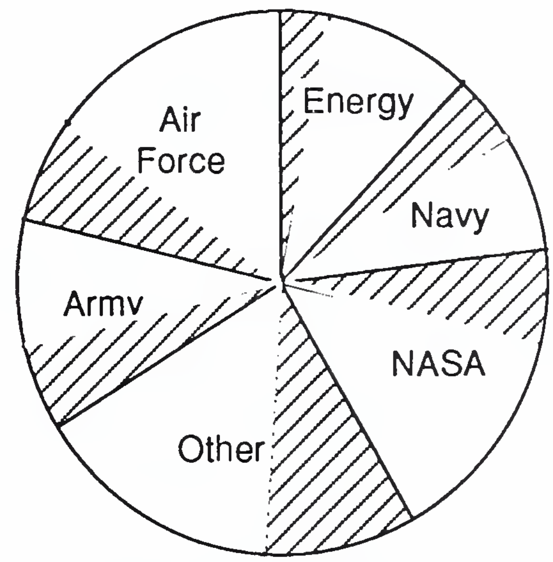
INPUT's report gives you the in-depth information you need to exploit this tremendous potential. Some of the major trends the report examines include:

- A separate and comprehensive forecast focusing on Ada products and services;
- The technical staff shortages plaguing some agencies, and the opportunities this trend opens for all vendors;
- The increasing trend toward software [illegible]tification, the pitfalls and opportunities it represents;
- The increasing difficulty associated with going it alone in this market, and how various kinds of alliances can open doors for you;
- The increasing inclination toward economical, noncustom solutions in some agencies, in situations where economy and full functionality are in the balance;
- And the growing trend toward standardization, including recent developments in the POSIX and GOSIP markets.

The market for government software and services is growing steadily, but to find the best opportunities there, you need timely and comprehensive market intelligence.

That is the purpose of INPUT's new report on *Federal Software and Related Services, 1989-1994*.

Largest Agency Buyers of Software and Related Services, 1989



Software Products / Software Development

THE BIGGEST BUYERS are highlighted in this exhibit from the report. Note the difference between products and development services.

To give you a concise but thorough overview of a rapidly evolving market. To help you make the most of a complex and challenging opportunity. And ultimately, to help you turn the trends in the government software markets to your own advantage.

INPUT is offering you the best tool you could ever have to help you penetrate the government software markets. Why not fill out the enclosed order form and send it in today?

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If You Need the Best Available Analysis of Executive Information Systems Today . . .

- ▲ What are the New Ten Commandments of EIS?
- ▲ Who are the major players?
- ▲ What are the technological trends?
- ▲ How big is the market?
- ▲ How do you succeed with EIS?

. . . INPUT Can Put that Analysis at Your Fingertips Now!

A new INPUT report on Executive Information Systems clarifies the emerging opportunities and tremendous potential in this new, fast-growing, and sometimes confusing market.

And if you act before December 31, 1990, you can have the report for $60 less than the regular list price—a savings of 10 percent!

Executive Information Systems (EIS) are the vendor community's attempt to storm what has been a citadel of computer resistance—executive desktops.

The technological foundations of EIS have changed dramatically, with mainframe systems being supplanted by personal workstations, local and wide area network capabilities, and relational data bases with high-level programming tools. But the goal has remained essentially the same: to provide executives who are essentially computer illiterate with a flexible, easy-to-use tool for rapid, ad hoc access to information of all kinds.

Developments in Executive Information Systems
EIS—Past and Future
• Prior to 1990 • EIS—A Definition • After 1990
The User View
• Demographics • Status and Activity • Lessons Learned • Planning for the Next Wave • The Value of EIS
The Vendor View
• Market Structure • Key Software Vendors • The Changing Market • Market Forecast
Conclusions and Recommendations

EIS Answers

With INPUT's report on *Developments in Executive Information Systems*, users and vendors now have access to the results of a months-long, in-depth research effort designed specifically to determine the exact characteristics of the EIS arena, and how you can shape your development or marketing efforts to take advantage of the opportunities emerging there.

The report analyzes the following questions in detail:

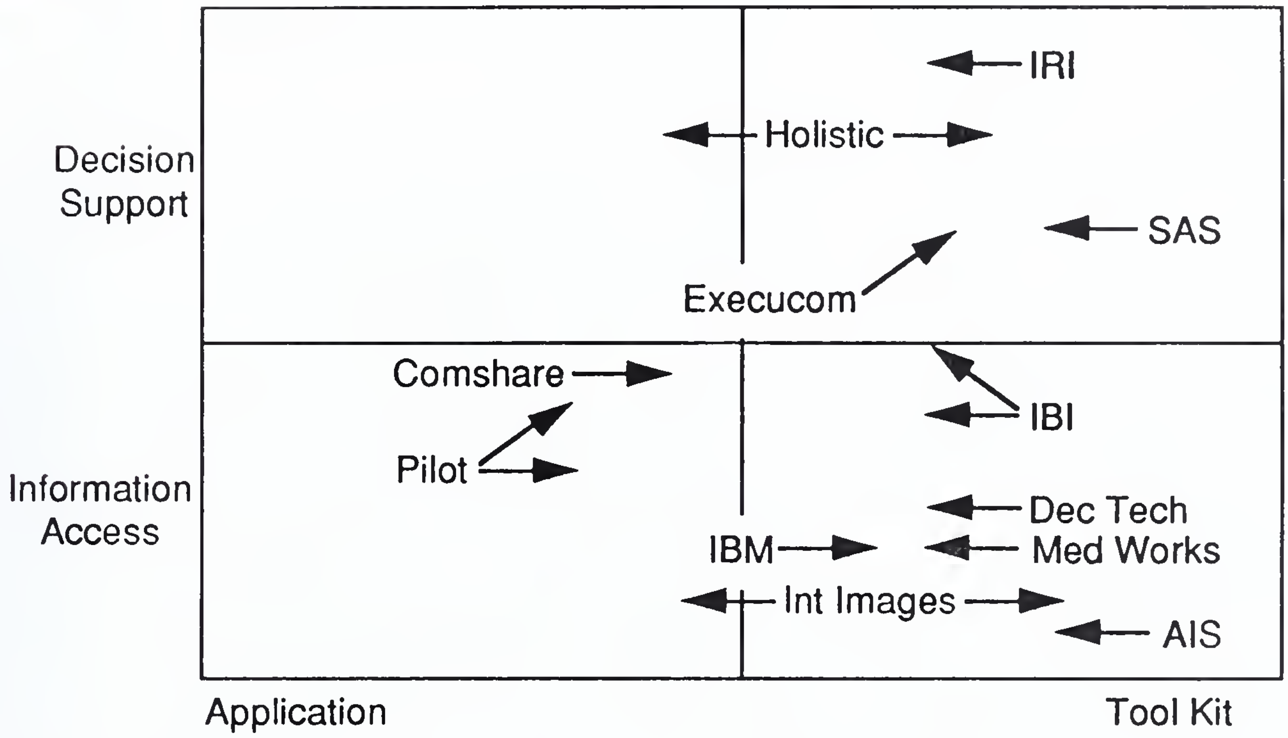
- What are the new Ten Commandments of EIS development and marketing?
- Who are the new sponsors of EIS development, and who makes the purchase decisions?
- What are the relative degrees of importance given by users to 13 different subapplications and categories of data in EIS?
- In what specific ways does EIS differ from traditional systems, and how can you exploit those differences?
- What types of users are in the wings, how sho[illegible] you plan to meet their needs?
- What do users and sponsors say they want out of EIS?
- What job titles and functional areas use EIS today? How will that change over next 18 months?
- What is the relative importance of the goals of timeliness, quality of information, support of management process, and use of information technology, according to executive users?
- What are the typical development times for EIS?
- What is the initial total investment, including software and staff?
- Where are the trendlines headed in pricing?

INPUT answers these and many of the other questions that will have a direct, practical bearing on your success in penetrating this final frontier of corporate computer use.

An Invaluable Guide

In addition to these specific issues, INPUT focuses its research in this report on some of the broader questions surrounding Executive Information Systems. The EIS market is in a constant state of upheaval because of the rapid technological developments that continue to change the basic platform, and because in the final analysis, EIS must be constantly adapted to fit the requirements not of classes of users, but of individuals.

EIS Software Vendors Classification and Direction



THE FOCUS AND DIRECTION of the various major EIS vendors is instantly discernible in this diagram from *Developments in Executive Information Systems*. This is the kind of information that the report supplies on vendor analysis, product analysis, market analysis, and other issues central to your success.

Developments in Executive Information Systems is an invaluable guide for vendors who need to understand the root causes of the market's changes, and how they can capitalize on them; and for users who need to understand the obstacles to EIS implementation. To determine where the technology is headed, INPUT deployed the resources of extensive mail surveys, broad telephone polls, and in-depth, focused telephone interviews of key participants. These survey results answer the following strategic questions:

- How is EIS technology changing? How does EIS compare to generalized cooperative processing?
- What is the size of the EIS user population within the typical company, and how will that change over the next five years?
- What are the obstacles to EIS success an how can they be overcome?
- How big is the EIS market now? How big will it get over the next five years? What are the compound annual growth rates of its components?
- How will the professional services component of EIS change over time, both in dollar value and in terms of the types of services required?
- Who are the key software vendors in this market? What are their products? Where are they positioned in the market? What are their strategies for increasing share?

Your Advantage

The EIS game has definitely changed. It is now a significant market, and it also shows definite potential to grow dramatically over the next five years. The EIS users who see the bigger picture; and the EIS vendors who shape their product and service offerings to take advantage of this bigger picture, are the ones who will succeed.

Be one of them. Order your copy of INPUT's *Developments in Executive Information Systems* today!

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INPUT

If You Want to Enter the CIM Systems Integration Market, Or Expand the CIM Side of Your Systems Integration Business...

- ➢ How big is the market, and how fast is it growing?
- ➢ What do users want from CIM vendors?
- ➢ What strategies are your competitors pursuing?
- ➢ What forces are driving the market?
- ➢ How can you benefit?

INPUT Has the Most Comprehensive Report on CIM Available!

Everybody wants to get into CIM these days, but very few companies—users or vendors—are doing it well. It's complicated, it's expensive, and it requires planners and implementers with the CIM knowledge and experience to change the way manufacturing companies operate.

INPUT has just published a new report entitled *U.S. Computer Integrated Manufacturing Systems Integration Market, 1990-1995*. This report gives CIM Systems Integration (SI) vendors a highly concentrated research tool designed to help them understand the broad trends in the market, what users say they need from vendors, and how to shape their businesses to take advantage of present and future CIM SI opportunities.

U.S. CIM Systems Integration Market, 1990-1995
Computer Integrated Manufacturing Market
• Market Environment • The Competitive Challenge • CIM Market Structure
Computer Integrated Manufacturing SI Market Forecast
• Systems Integration Market Structure • Market Forecast
Computer Integrated Manufacturing—The Buyer's Perspective
• CIM Strategies • The Systems Integrator's Role in CIM Systems
CIM Systems Integration Vendors
• Vendor Classification • Leading CIM Systems Integration Vendors • Vendors' Perspectives on CIM and Systems Integration • CIM Systems Integrator Profiles
Summary and Recommendations

A distillation of months of research into a complex and rapidly changing subject, the report cost INPUT tens of thousands of dollars to produce. The list price of $1,995 is a tiny of fraction of that total, and represents an excellent value.

But if you act before January 31, 1991, you'll receive a substantial discount on this report, paying $200 less than its regular list price —a savings of 10 percent!

The CIM market offers tremendous growth opportunities for vendors. But to take advantage of them, you need the best available information on where those opportunities are, and how you can best take advantage of them.

And that's exactly what you get with INPUT's newest research.

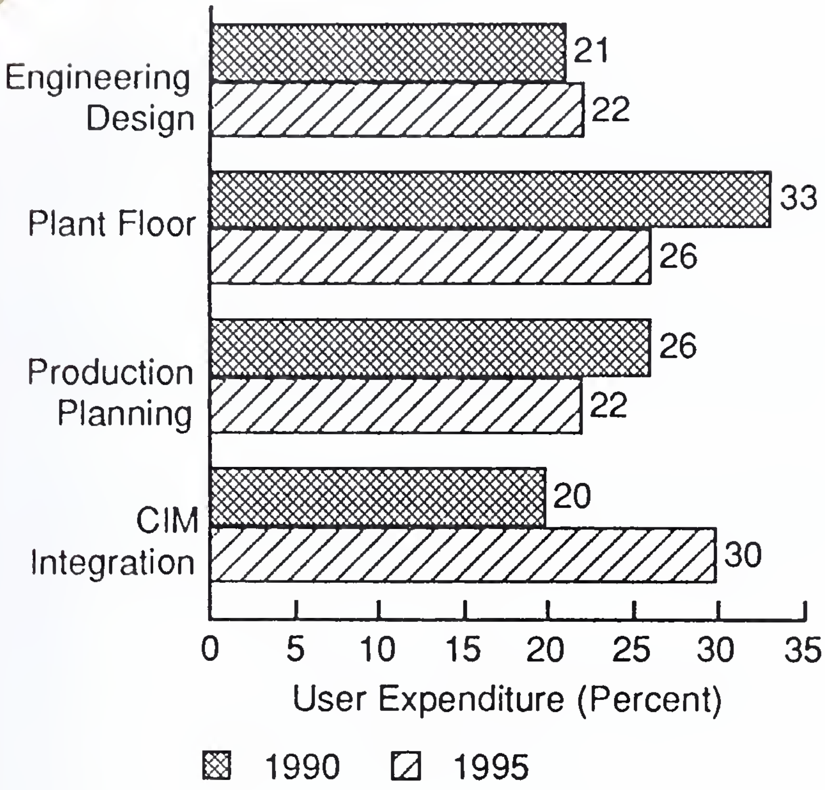
Making Sense of CIM

To make better sense of the CIM market, INPUT's report breaks it down into three elements: engineering and design applications; production planning activities; and applications that support the plant floor.

Then the report analyzes each of these market elements in considerable detail, offering vendors insights into key questions about large-scale market trends:

- Which are the largest CIM market opportunities today? Which show the greatest potential for sustained growth?
- What forces are driving change in the CIM market?
- What are the major issues facing manufacturers who want to implement CIM strategies?
- How is the focus on JIT and TQC offering SI vendors real opportunities in the manufacturing markets?
- Who are the leading vendors? What have they done in CIM recently? Where do they focus their attention?
- Why, in detail, are users considering CIM?

CIM Systems Integration Spending Distribution



INPUT GOES BEYOND simple market figures and projections to give you in-depth analyses of every significant CIM market segment.

In addition, the report discusses how the larger issues of global competition, core business focus, comparisons of discrete vs. process manufacturing, and more can be of value to you in shaping your product and service offerings.

The report also summarizes INPUT's extensive research into user attitudes about CIM, giving vendors a powerful marketing tool and sales aid. The report concentrates on questions such as:

- What are the most important reasons users give for employing systems integrators to implement CIM? How do they rank these reasons?
- What is the distribution of user expenditures for engineering/design applications, production planning activities, and plant floor applications?
- Who are the leading CIM vendors, and why are they so successful?
- How will users try to integrate CIM strategies into existing production environments?
- How do users rate the importance of vendors' CIM experience?
- What do vendors believe are the most important factors for CIM success?
- What do users believe?
- How do users rate their likelihood of using CIM SI vendors, by CIM function?

After investigating all of these questions, the report offers a summary of the study's implications for SI vendors considering the CIM market, with recommendations based on an evaluation of market forces, competitive trends, and strategic and tactical opportunities.

CIM offers tremendous potential, it's true. But for vendors who do not understand the scale of the average CIM project, and how easily such a project can be dragged down by requirements and specifications far outside the original proposal, CIM can be dangerous, too.

Information is what you need to make the most of your CIM opportunities. And information is exactly what INPUT's report on the *U.S. CIM Systems Integration Market, 1990-1995* gives you; targeted market intelligence, penetrating insights into complex markets, and competitive information in a market where every edge helps.

Get the benefit of the combined experience of INPUT's CIM experts. Use the enclosed order form to get your copy of *U.S. CIM Systems Integration Market, 1990-1995* today.

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If You'd Like Detailed Information on How Companies Are Dealing with EDI Integration Issues Today...

- How EDI changes accounting
- How EDI improves resource control
- How EDI changes workflows and job descriptions
- How EDI enables new product and service offerings
- How some EDI users have become successful EDI vendors

...INPUT Analyzes EDI's Tactical and Strategic Impacts in the Real World!

Information on how EDI is really being used out there in the real world would be of tremendous value to users who want to avoid reinventing the wheel, and to vendors who want to refine their development and marketing efforts. Yet this information has been almost impossible to get.

Until now. INPUT has just released its new report on *EDI: Business Integration Issues*, a comprehensive and detailed analysis of the impacts of electronic data interchange on companies in every major industry.

This is not macroeconomic theory. This is case-study analysis designed to ferret out the competitive advantages and disadvantages of EDI when companies—your competitors, clients, and suppliers—actually take the plunge.

EDI: Business Integration Issues
The Organizational Impact of EDI
• The Tactical Impact of EDI • The Strategic Impact of EDI • Systemic Knowledge, EDI and Integration
Tying EDI to Business Operations and Strategy: Standards and Accounting
• Assessing When and Where EDI is Appropriate • The Importance of Standards • Problems and Issues with Today's EDI Standards • Activity-Based Accounting and EDI
EDI Integration Tools and Allied Information Technologies
• EDI Software Products • Messaging Systems and Environments • Automatic Identification • Data Capture
Conclusions & Recommendations

The report is based on ongoing primary research into one of the most complex and fast-moving technologies in existence. Interviews with vendors, with users, with standards-making bodies, with the people forging this new technology and its place in business today form the framework of the report. But the analysis by INPUT's EDI experts gives you an additional value-added interpretation that is available nowhere else.

And if you act before November 19, 1990, you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

EDI: Business Integration Issues is the only source of reliable and comprehensive information on the day-to-day integration questions that can have such a tremendous impact on how successful EDI is in normal business environments.

Not Just Information

But it's not just information. INPUT's report is designed to put the tactical and strategic impacts of EDI into perspective, to allow users and vendors to answer the questions that bear on competitive advantage in their own markets:

- How does EDI change workflows and job descriptions? The report analyzes how buyers at Digital Equipment Corp. have become liaisons between customers and design engineers.
- How does EDI change accounting practices? The report investigates: the merger of ship notice and invoice for SuperValu, a large food retailer; the elimination of reconciliation disputes in the oil industry using an EDI package called Petroex; the switch from credit to debit mechanisms initiated by R.J. Reynolds Tobacco; and others.
- How does EDI enable companies to offer new products and services? The report details: the transformation of Merit Steamship Agency Inc., a mid-size shipping company, from agent

to electronic information supplier thanks to EDI; the evolution of customs broker Penson and Co. into a supplier of on-line information on freight moving through customs; the expansion of Sears Roebuck's product line to include EDI software and services; and more.

- How does EDI change the structure of organizations? The report describes: the development of closer relationships between suppliers and their customers, including the pioneering efforts of Levi Strauss and Playtex; the merger of sellers' accounts receivable with buyers' accounts payable at General Electric Information Services Co.; the centralization of purchasing operations at Hewlett-Packard and Mervyn's.

And other impacts such as the role of EDI in mergers and acquisitions, coordinating manufacturing activities, and business expansion.

An Advantage in EDI

These case studies make up a large proportion of the report. But *EDI: Business Integration Issues* also addresses larger issues that place these company-specific developments in perspective:

- How is EDI restructuring value chains?
- How is it conferring competitive advantage in various industries?
- How do you assess when and where EDI is appropriate?
- How do you assess its effects on all departments?
- What are the potential impacts of new business strategies on EDI standards?
- How will developments in EDI data mappers, bar code technologies, data bases, and natural language processing affect EDI?

EDI Is Best Suited for Repetitive Commercial Exchange of Well-Defined Products

product-feature ambiguity \ commercial exchange recurrence	low	high
high	- large professional service projects (construction...) - big ticket items (IBM 3090...)	- fashion apparel
low	- once-a-year expenditures	- office supplies - non-fashion apparel - grocery products - replacement parts - transport documentation

Plus a thoughtful section on recommendations for EDI users and vendors, and a look into the technological and organizational future of electronic data interchange.

EDI is here to stay, and its impacts will extend far beyond esoteric changes in accounting and purchasing practices. With changes of this magnitude happening this fast, there will be tremendous opportunities for competitive advantage *if you have the right information.*

And giving you the right information is what INPUT's EDI integration report is designed to do.

Do you want that advantage? Then fill out the enclosed order form and drop it in the mail today.

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INPUT

When You Absolutely *Have To Know* What's Happening in the U.S. Systems Software Product Markets . . .

- Which market segments are growing fastest?
- Who are the competitors you have to watch for?
- Who's winning the standards battles?
- Why is the CASE market sluggish?
- How will changes in UNIX, cooperative processing, and RDBMSs affect you?

...You Have To Have the Latest Report from INPUT!

To make money in systems software products today, you need targeted intelligence that pinpoints the opportunities—and the risks—in a market that has become one of the fastest growing areas of the information industry.

INPUT will soon release a new report that concentrates this market intelligence in a single volume. Entitled *U.S. Systems Software Products Market, 1990-1995,* the report gives you a powerful weapon you can use to make the right decisions in an increasingly complex competitive environment.

At the regular list price of $2,995, it is a tremendous value.

U.S. Systems Software Products Market, 1990-1995
Issues and Trends
• General Business • Information Services Industry • Key Issues and Trends for the 1990s • Future Issues and Trends
Competition
• Key Strategies • Mergers and Alliances • Market Share • Shifting Market Structure
Market Forecast
Profiles
Conclusions and Recommendations

But if you act before December 31, 1990
you'll pay the pre-publication price
—$300 less than the regular price—
a savings of over 10 percent!

Why not get the best information available on a market whose developments could have a tremendous impact on your company's fortunes?

A Tool for Strategic Marketing

The report offers you excellent five-year market numbers, of course.

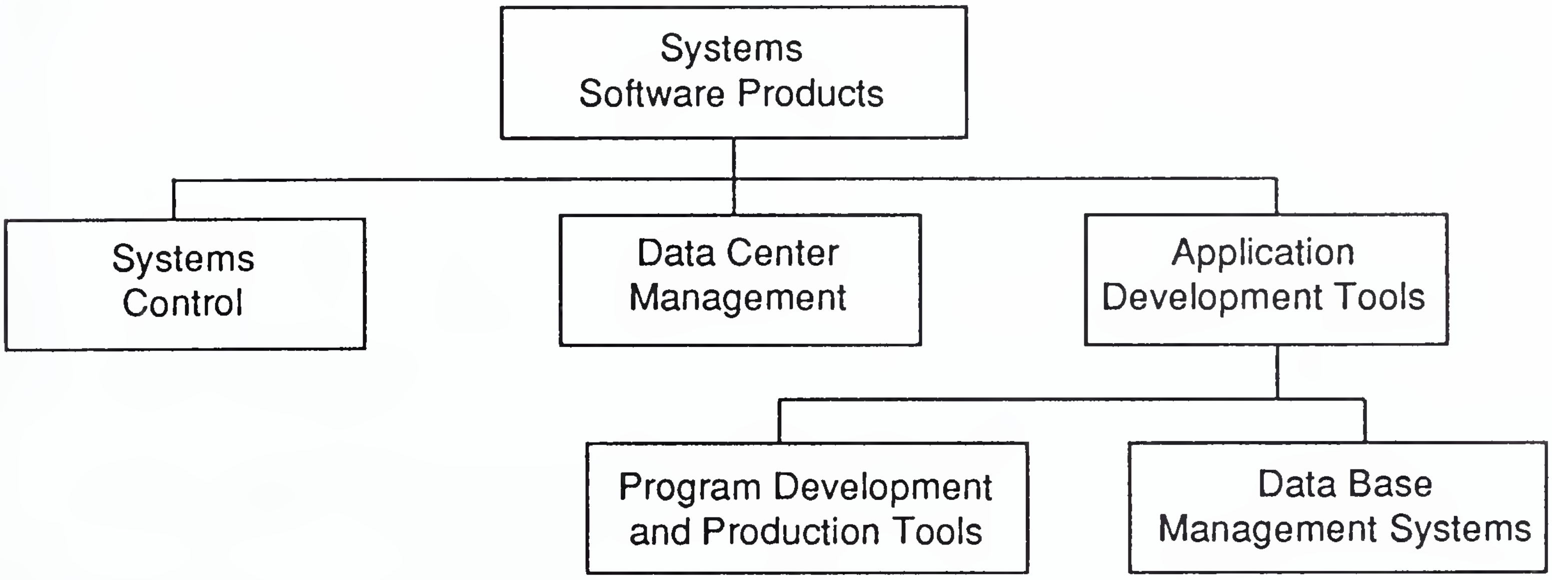
But it doesn't stop there. *U.S. Systems Software Products Market, 1990-1995* divides the market into three broad categories: Systems Control, Data Center Management, and Applications Development Tools. It then focuses on the issues you have to address in three platforms within each category: mainframes, minicomputers, and PC/workstations.

The report is therefore a powerful tool for strategic marketing, answering questions such as:

- Precisely where are the growth opportunities in nine market categories, and what forces are driving or hindering that growth?
- How will users' responses to the competing pressures of industry and proprietary standards affect *your* business?
- How successful will UNIX really be as a commercial operating system?
- How is the market for relational data base management systems changing, and how will those changes affect you?
- Where are the opportunities in cooperative processing?

And other large-scale questions that have a major impact on your strategic outlook.

Systems Software Products Market Structure



INPUT's analysis differentiates the forces impacting each of these segments.

Operational Intelligence

In addition, the report looks at tactical, competitive issues whose analysis can be useful in day-to-day operations:

- Are the open systems hardware vendors as deeply committed to UNIX as they say they are?
- Why are some companies concentrating so many resources on data center management software?
- Why is the use of CASE tools growing as slowly as it is?
- How are the minority investments of IBM, EDS, DEC, and others changing the systems software products markets?
- How will the trend toward outsourcing data center management affect you?

And more on everything from "lights out" data centers to the minitrend of bundling free data base software with many different kinds of operating systems software.

A Double Value

INPUT's report, *U.S. Systems Software Products Market, 1990-1995,* is the kind of competitive weapon that is doubly valuable to you—because it gives you clear answers to difficult questions, and because it would be literally impossible to duplicate the research and analysis that created it.

INPUT's systems software product analysts know the market from both sides. They have decades of experience as users and vendors, and have tracked the developments in this pivotal

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INPUT

What You Have To Know To Exploit Systems Integration Electronic Imaging Opportunities . . .

- ✔ What is the size of the systems integration imaging market?
- ✔ How fast will it grow over the next five years?
- ✔ What are the hottest applications in imaging?
- ✔ Who are the leading vendors, and what are they doing right?
- ✔ How are imaging systems being implemented?

. . . That's What INPUT's Newest Imaging Report Gives You!

Imaging.

It's one of the most exciting market opportunities in systems integration right now, outperforming the market as a whole in the United States by a factor of two. But to make the most of this complex opportunity requires sound market judgment based on the best research and analysis money can buy.

Electronic Image Processing 1990-1995
Market Forecast
• Market Analysis • Major Markets
Image Technology—An Overview
• Imaging Environment • Imaging Media • Imaging Systems • The Legality Issue • Technology Trends
User Application of Image Technology
• Current Status • Image Technology Applications • Justifying Image Technology • Use Impediments • Systems Integrators
Image Technology Vendors
• Image Processing Business Strategy • Systems Integration Vendors • Image Processing Is Important • Electronic Imaging Alliances • Driving Forces • Inhibiting Factors • Customized Imaging Products • Standards Issue • Markets Served • Leading Vendors
Conclusions and Recommendations

INPUT has just published a new report entitled *Electronic Image Processing, 1990-1995*, that distills this U.S. market intelligence into a single volume, giving you a competitive weapon you can use to make informed decisions about imaging product development, strategic marketing, and sales.

But if you act before January 15, 1991, you'll pay just, $1,795 for the report! That's $200 less than the regular list price for the report—a savings of 10 percent!

It's a hot report on a hot topic—for a price that's tough to beat. If you need detailed market intelligence on the opportunities in electronic imaging, this is the report for you.

Impact

The systems integration electronic imaging market is changing about as fast as imaging technology, which has taken gigantic strides in the past couple of years. INPUT analyzes these changes, their impacts on your product offerings, competitive positioning, and marketing strategies. The report addresses questions like:

- How big is the systems integration electronic imaging market, and how fast will it grow over the next five years?
- Where are the best growth opportunities *within* imaging?
- What forces other than business competition are driving the imaging market?
- How will the trend toward moving data input closer to the point of origin encourage more product integration?
- How important is price/performance to the imaging system user?

- What impact does the lack of standardization have on the market's growth rate?
- What effect does imaging have on customer service?
- How do users evaluate the legal issues raised by widespread document imaging capability?
- How should imaging vendors shape their strategies to exploit future opportunities?

And many other issues regarding broad trends in a technology that is likely to transform the way all types of companies do business.

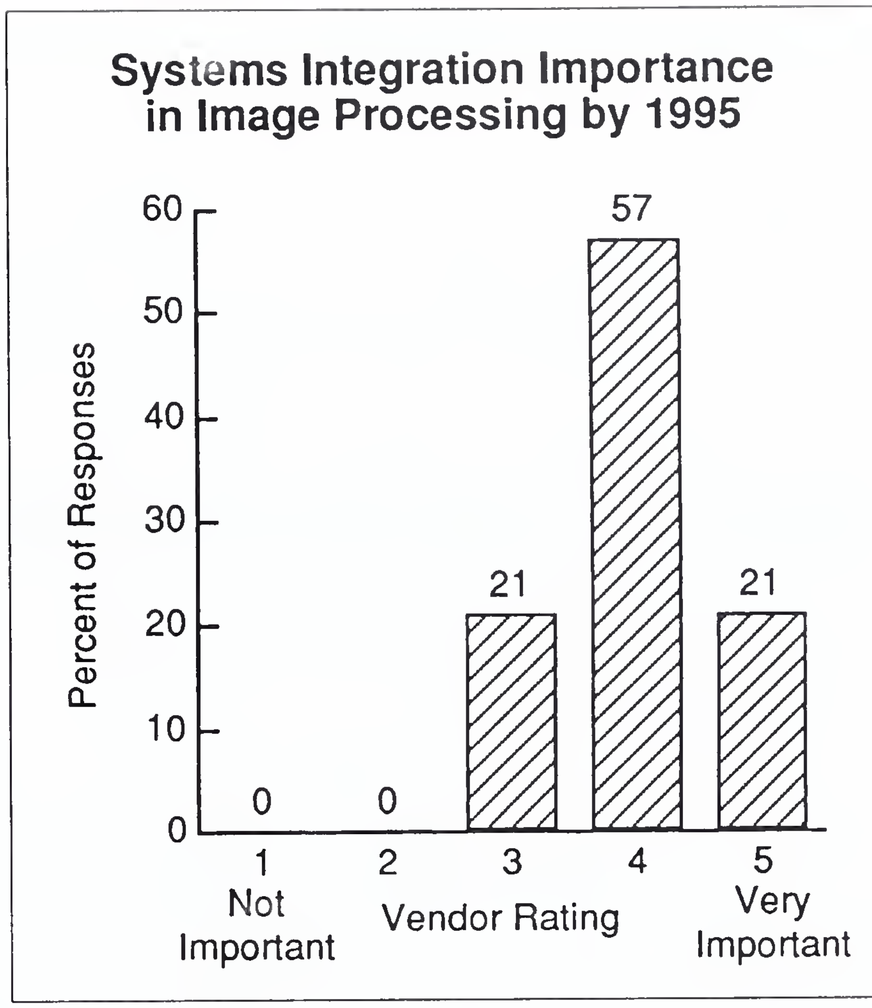
Where the Opportunities Are

In addition to these broader questions, the report, *Electronic Image Processing, 1990-1995*, addresses tactical issues that can make a difference in your day-to-day operations, including:

- Who are the major imaging vendors, and what are they doing right?
- How are companies using OEM agreements, project teaming, VARs, and other kinds of alliances to enhance their market penetration?
- How do users rate the relative importance of image implementation experience, proven imaging architectures, industry knowledge, and imaging software products as selection criteria for imaging vendors?
- What do users say will have to happen to increase their use of imaging technology?
- Which industries have the most aggressive plans for implementing imaging systems?

The report also includes discussions of preferred implementation methods, the relative importance of new versus inserted technology, ratings of various cost justifications, levels of customization, and more.

The first half of the 1990s will see a rapid evolution of opportunity in imaging. That's why INPUT has brought every aspect of its formidable research infrastructure to bear on discovering the crucial market and competitive truths about imaging technology during this period of growth and maturation.



VENDORS AGREE that systems integration will become an important means of implementing image processing in 1995. INPUT's report details the opportunities available to systems integrators.

Our senior research staff has tracked developments in imaging from both the user and vendor perspectives. Their experience and analysis provide some of the best statistical research ever done on this market.

And you get both when you purchase *Electronic Image Processing, 1990-1995*. Use the enclosed form to order your copy today.

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Workstation Software Applications Products Opportunities, Western Europe, 1989-1994

Workstation Software

- Assess the potential of the market
- Discover the effects of UNIX
- Find out user requirements
- Compare vendor attitudes
- Learn which application sectors are growing the fastest
- Use the extensive 5-year forecasts to plan ahead

Companies profiled:

Sun

Digital

Hewlett-Packard

IBM

Bull

"Workstation manufacturers are convinced that their machines are the way forward for the average corporate PC user and no longer the sole province of engineers and programmers."

Workstation Software Applications Products Opportunities, Western Europe, 1989-1994
Market Size and Forecasts
• Software products market environment • Overall software • Workstation software • Country market
Issues and Trends
• Workstation applications software, competitive environment • Industry-specific applications • Cross-industry applications • Systems software • Product development issues • Technical issues: RISC, UNIX • User organisational issues • Workstation software issues • User view of application requirements • Mergers, acquisitions and alliances • Workstations and the PC

The market for workstation software is growing at a faster rate than any other part of the software products market. This growth can be attributed to the trend towards distributed processing, away from the environment where many users share a mini or a mainframe.

The report examines each of the main groups active in the workstation market:

- European-owned independent vendors
- U.S.-owned independent vendors
- Equipment manufacturers

and discusses activities in

- Industry-specific markets
- Cross-industry markets

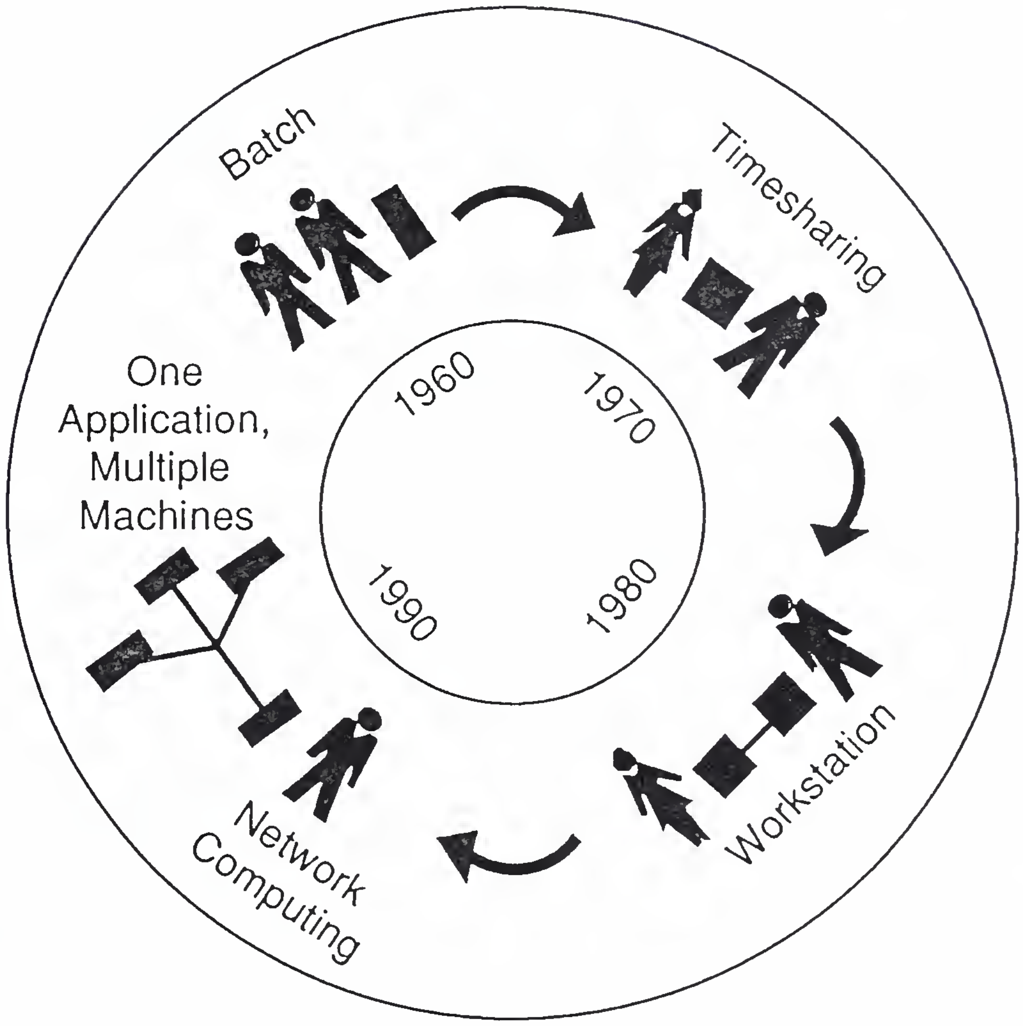
You will learn the opportunities available and the current competitive environment for:

- Project management software
- Bundled solutions
- User interface management systems
- Computer-aided engineering
- Electronic design automation
- Application development tools
- Object-orientated techniques
- Mapping software
- Expert systems

INPUT

Vendors who best understand the way in which the workstation market is changing and can respond to users' demand for more commercial applications software will gain a significant competitive advantage. Vendors need a clear, defined approach to standards in order to produce integrated software solutions which run under several hardware environments. Products need to be easy to use, perhaps providing graphical user interfaces. INPUT's report gives you the information you need to gain the competitive edge. It is essential reading for any company involved in, or thinking of entering, the workstation applications software market.

The Evolutionary Loop of Computing



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INPUT

Gain Insight Into Key Trends in the Management of Information Systems in the 1990s...

The Future of Information Systems Management

Read this report if you are:

■ **A chief information officer who is**

- An end-user responsible for information distribution
- Considering electronic information options in the enterprise
- Needing to understand the technology changes affecting operations
- Looking to have an understanding of the differing organizational structures and responsibilities of information systems during the 1990s

■ **A hardware, software, or professional services vendor that is**

- Participating in or considering entering the systems integration/operations market
- Responsible for industry market/systems/service development

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Understand the Impact that New Technologies Will Have on the Role of Information Systems...

Since the early 1980s, there has been a growing thrust within information systems organizations to become more involved in the strategic direction of the enterprise. Once a servant of the corporation, information systems have now been placed, or at least identified, as a critical factor in the success of the enterprise. INPUT has undertaken a study to gain a realistic view of the role of the information systems function, and especially the CIO (Chief Information Officer), to the business enterprise.

The Future of Information Systems Management
The Role of the CIO
• The CIO's objectives • Qualifications • Critical success factors
IS Role Structure
• IS responsibility framework • Impact of industry focus • Product orientation
Business and Technology Trends
Future of the Information Systems Function
• IS organizational structures • Network Environments in the 1990s • Development Environments in the 1990s • Role of the information services vendor

INPUT has conducted a series of recent projects, including:

- INPUT/Andersen Consulting CIO study
- INPUT's annual user survey of 250 IS executives
- INPUT/POSP (profit-oriented systems program) joint study
- A number of consulting engagements to analyze the information systems functions in specific organizations

INPUT has concluded that the role of the information officer is, or should be paramount in supporting business goals.

As revealed in the study, the qualifications of the successful information officer of the 1990s should include:

- Intuitive understanding of business/technology relationship
- Managerial perspective
- Business orientation
- Excellent staff support

Differentiation of the CIO role within diverse industries is also explored. Analysis indicates that the actual division of responsibilities between corporate and distributed systems is dependent on whether the organization is, for example:

Orientation	Industry
Information-oriented	Bank and finance Insurance Telecommunications
Service-oriented	Retail/wholesale distribution Transportation Utilities Medical
Product-oriented	Discrete manufacturing Process manufacturing

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THE FUTURE OF INFORMATION SYSTEMS MANAGEMENT

Because of its leadership and expertise in research into the information needs of leading-edge corporations, INPUT has released this report, *Future of Information Systems Management*. This report supports the critical requirement of organizations looking to the IS group to provide the capability to solve competitive attacks to the business enterprise. This study will:

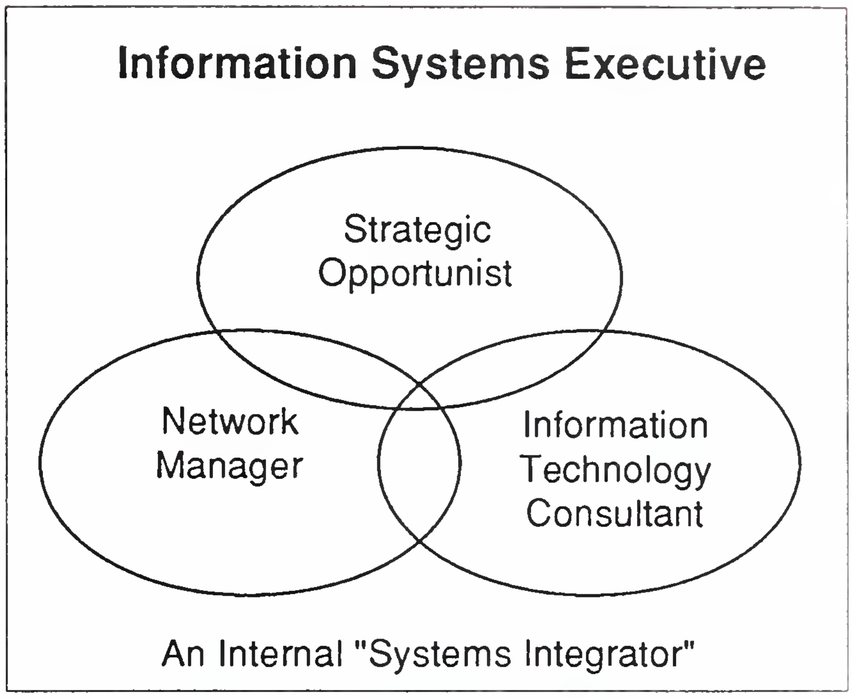
- Provide an understanding of the organizational structure and strategic responsibilities of the information system function during the next decade
- Discuss emerging technologies that will create new kinds of strategic applications
- Analyze opportunities in out-sourcing to provide full-solution data center management and distributing operations to allow for a focus on strategic applications
- Discuss the need for a more flexible organization to address the globalization of business activities

Four key areas are scrutinized:

- The role of the CIO
- Industry differentiation
- Business and technology trends
- Forecasting the future

In addition, the roles and responsibilities of information systems officers have been scrutinized as to the product or service, including:

- The involvement in enterprise planning
- [illegible] ability (responsibility) to formulate policy



The changing role of the IS executive is suggested by the above graph. INPUT's report analyzes the importance of this role for the flexible, global, and responsive corporation of the 1990s.

Although factors such as corporate culture, product technology, and organizational philosophy have an enormous impact on the strength of the IS organization, INPUT believes that all-told the role of the IS organization will be dominant in the progress of the enterprise.

AVAILABLE IMMEDIATELY

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EDI Strategies for Success: Opportunities for Growth and Profits in the 1990s

EDI Advanced Services

EDI Users:

- REVIEW today's installations of advanced EDI services such as transaction data bases, CAD/CAM file transfers, and inventory modeling from POS data
- LOOK INTO THE FUTURE to the coming possibilities of EDI, such as natural language translation
- SHOP INTELLIGENTLY by knowing the issues and the vendors of advanced EDI services
- LEVERAGE your company's existing EDI program

EDI Network, Software, and Professional Service Vendors

- IDENTIFY NEW MARKET OPPORTUNITIES in EDI
- MAXIMIZE your R & D customer support strategy by addressing users' real concerns and requirements (based on INPUT's EDI user surveys and case histories from the users' perspective)
- FORECAST your market's potential with INPUT's competitive analysis —where the Advanced EDI Services market is expanding and where time is running out

Companies Profiled:

General Electric Information Services Sterling Software / Ordernet, Quick Response Services, Chase Manhattan, Wells Fargo, R.J. Reynolds Tobacco USA Inc., General Motors, The Internal Revenue Service ...and more

New EDI Opportunities for Maximized

" The most lucrative opportunities for vendors to the EDI market are through providing value-added or 'advanced' services. "

from INPUT's *EDI Advanced Services*

EDI Advanced Services
Market Size and Forecasts
• Advanced EDI Services Are Growth Frontiers • Advanced EDI Services Are the Fastest Growing Market Segment in EDI • Forecasts for Advanced EDI Services • Forecasts for Specific Services
Issues and Trends
• Relationship between EDI and EFT • Corporate Users of EDI/EFT • Bank Providers of EDI/EFT Services • On-Line Data Bases and EDI • Transaction Data Base Issues and Opportunities • Graphics, Nonuniform Data and EDI • Internetworking Services • User Concerns • Data Capture and Analysis Services • Network Vendor Concerns • Implications of Interactive EDI • The Future of Advanced EDI Services • Bank Industry EDI/EFT Strategies

New EDI applications are going beyond mainstream uses such as purchasing and logistics. The market for value-added "advanced" EDI services is growing at an annual rate of 80%! These new applications and services, pioneered by innovative vendors and users, include:

- Integration of funds transfer mechanisms with EDI
- Exchange of graphics files with EDI standard messages
- On-line data bases in conjunction with EDI
- Interactive EDI
- Satellite-based transmission techniques
- Interconnection of third-party networks and international services for EDI
- Conversion services between EDI and other communications media
- Processing of EDI data to produce other kinds of data and information.

" By 1994, one-fifth of user expenditures for EDI services will be devoted to advanced services—services offering the highest profit margins to vendors and the greatest value-added services to users. "

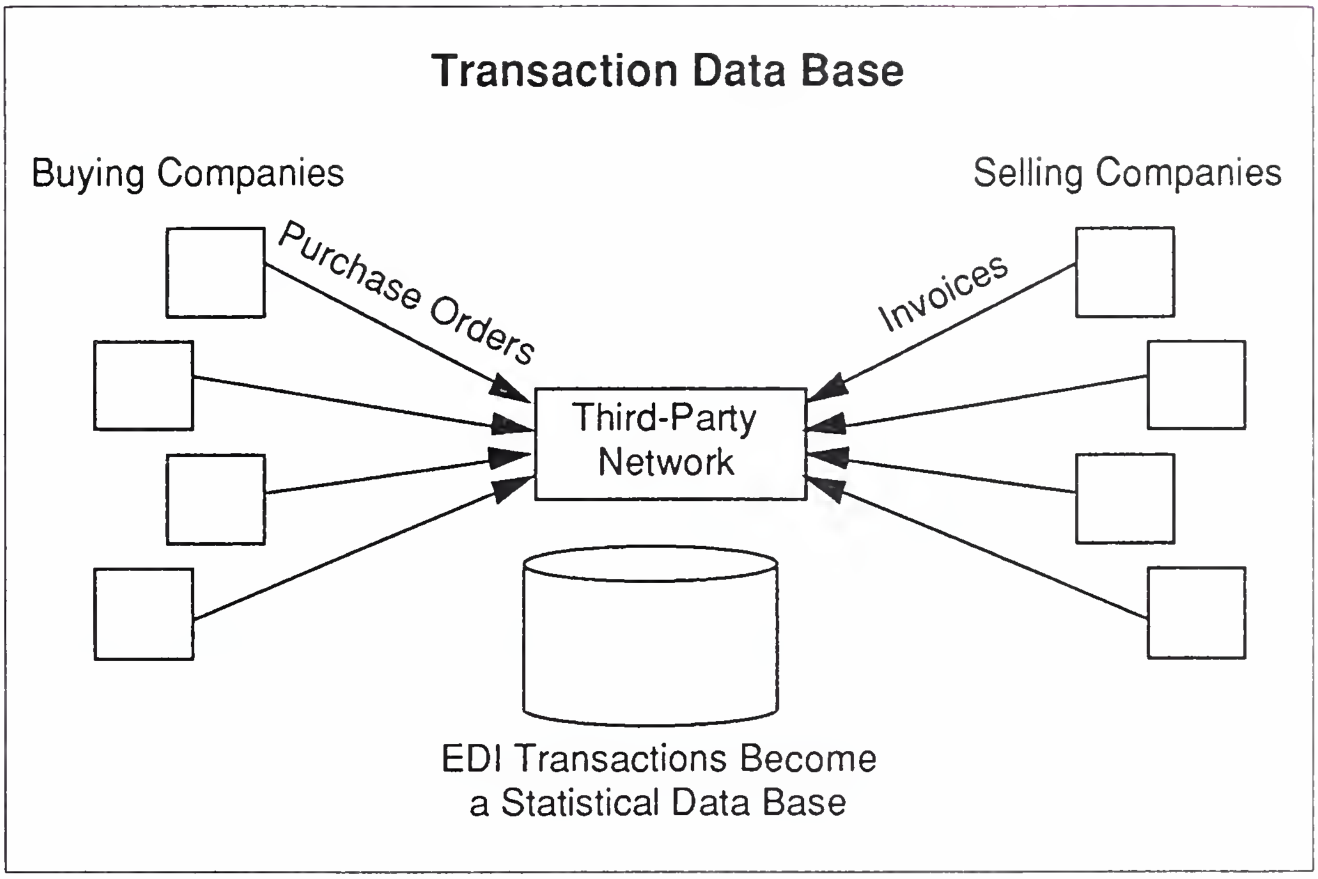
from INPUT's *EDI Advanced Services*

INPUT®

Growth and Profit in the 1990s

Be Prepared to Compete

Both vendors and users who really understand the opportunities and pitfalls of advanced EDI services will gain a significant competitive advantage. Vendors who identify their market niche correctly, avoiding areas where product homogenization and competition is already eroding margins, can realize dramatic profits in the 1990s. Users with the know-how to develop their own applications or invest in the right vendor offerings can streamline their services, eliminate accounting and inventory errors, move products faster, and expand their range of trading partners. INPUT's *EDI Advanced Services* gives both vendors and users the information they need to gain the competitive edge.



EDI transactions create a statistical data base capable of providing valuable market data and analysis.

Optimize your EDI Operations and Profits

Advanced EDI services mean new sources of revenue for companies in the know. Opportunities for creating revenue by optimizing value-added EDI services are proliferating. Integrated systems that trigger electronic payments when goods arrive at the warehouse save time and money. The ability to check and verify incoming EDI messages interactively makes just-in-time inventorying possible.

Retail users can streamline their operations by downloading product line codes into standardized data bases so their buyers can update their internal systems. Advanced EDI systems can automatically calculate replenishment purchase orders and compile valuable market share data. Levi Strauss, Playtex, and American Airlines are among the companies who have discovered the profit-making potential of advanced EDI services.

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Opportunities for Software and Services Companies in the Insurance Sector

Use this report to find out:

- The size of the market for software and services in the insurance sector
- Growth forecasts
- The driving forces in the market
- Insurance companies' priorities in software and services
- Recommendations for vendors

- Insurance companies to become fully electronic in the 1990s
- Huge increase in demand for software and services

Discover the Opportunities

If your company is involved in marketing software and services to the insurance sector, you will already be aware of some of the issues facing insurance companies. Changes such as deregulation, extra competition from banks and rapid technological development are giving rise to an increased demand for software and services.

However, do you know the demand for the products and services that your company provides? Are you aware of all the new opportunities that are arising?

INPUT's recent study of the insurance sector will provide you with the information you need to assess your company's position in the market.

Specifically, you will learn:

- Software and services spend in three sub-sectors:
  - life
  - non-life
  - reinsurance
- The demand for software and services for:
  - mainframes
  - minis
  - PCs
- Opportunities available for computer software and services vendors
- Country market differences

High Investment in IT by Insurance Companies

The major opportunities for software and services vendors in the insurance sector in the 1990s will stem from the insurance industry's move to become fully electronic in the 1990s. Investment in IT is running at around 15% of insurance companies' operating expenses and this is likely to increase substantially over the next five years. Many companies are finding that the packaged solutions that they currently use are not flexible enough to cope with their growing information requirements. Insurance companies are offering a wider range of services now in order to compete with banks, which are entering their markets. Also, there is still enormous scope for reducing the volume of clerical tasks.

All these factors represent significant opportunities for vendors. The more your company knows about this fast-growing market sector, the more successful it will be in taking advantage of these opportunities.

Insurance companies do not only require systems to carry out basic functions such as claims registration and acknowledgement, third-party instructions, and claims payments. There are also a number of 'internal consumers' of technology, whose needs the report also addresses. An insurance company or broker deals with a number of different business areas, and as a result needs statistics to monitor trends.

DEPARTMENT	INFORMATION NEEDS
Corporate Management	• trends in complaints • renewal trends • average time between notification and settlement
Underwriters	• targeting specific groups • marketing profiles
Marketing Department	• current client profiles • new service opportunities

INPUT

Demand for Services in a Fragmented Market

The Western European insurance market is very fragmented, and in order to survive in a single competitive market, many companies have been forming alliances. This fragmented market means that the software and services market has distinct national characteristics, and INPUT's report will help you identify them.

INPUT predicts that there will be enormous demand for a variety of software and services in the insurance sector over the next five years, and these are summarised below:

KEY AREAS

- Systems and network integration
- Artificial intelligence
- Expert systems
- Network services
- PC software
- Turnkey systems
- Application development tools

If your company is active in any of these areas, INPUT's report will assist you in applying them to the insurance market.

Report Contents

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European Software and Services Market, 1990-1995

Banking and Finance Sector

This report will provide you with:

- Information on the opportunities available for software and services vendors in the banking and finance sector
- Discussion on market development
- Discussion on the changes instigated by the European Commission
- Vendor profiles
- Five-year market forecasts by delivery mode and by country

❖ Banking and finance institutions are restructuring in the 1990s

❖ Software and services vendors are in demand to help set up new systems

The Winds of Change

The European Commission plans to deregulate financial markets by 1 January, 1993. This is forcing banking and finance organisations to restructure and at the same time develop new products and services. In addition, the market is becoming more competitive, as banks and other financial institutions expand beyond their traditional market niches. As a result of merger and acquisition activity, new larger financial organisations are evolving, needing assistance from software and services vendors to integrate their existing information systems and develop new ones.

A New Opportunity

As the banking and finance sector comprises about 20% of the total European software and services market, this represents a significant opportunity for vendors. INPUT's report will help you to identify these opportunities. The report covers the banking and securities markets.

Deregulation means that any EEC financial institution will be free to extend its range of services beyond those defined by national legislation. Deregulation is also affecting non-EEC organisations. Banks are seeking to expand their range of products to the private customer, covering insurance, house financing, investments and even holiday travel. New technology will be required to support these operations; INPUT's report details some of the important factors users should take into account when considering investment in technology.

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Big Player Market

The banking and finance sector is currently dominated by a small number of very large vendors. About 3% of these vendors control 70% of total end-user revenues. One of the reasons for this dominance is that banks make their information services decisions centrally, which creates an ideal market for large vendors to serve them. INPUT's report profiles some of these vendors, providing essential competitive information. The report also analyses the market share of different groups:

- Closed user groups
- Equipment vendors
- Independent vendors
- Electronic information service suppliers

High IS Spend Planned

Banks have traditionally been big spenders on information services—between 15% and 20% of their budgets are for IS. Information managers in banking are very concerned over establishing the right priorities and maintaining development schedules within budget—a challenge for vendors. INPUT believes that there will be strong demand for key professional services, and in some areas for software products, EDI and especially EFTPoS. The report details this demand.

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Applications Solutions Opportunities Western Europe, 1990-1995

A NEW REPORT FROM INPUT

This report will help you assess the opportunities available for software application solutions in Europe. INPUT's report:

- Provides five-year market forecasts
- Identifies the fastest growing markets
- Describes market developments
- Discusses key opportunities for:
  - vertical market products
  - cross-industry market products
  - application software products
  - turnkey systems
- Discusses market issues
  - industry standards
  - quality
  - integration

Key Vendor Challenges

To provide:

- ➤ Integrated products
- ➤ Pan-European support

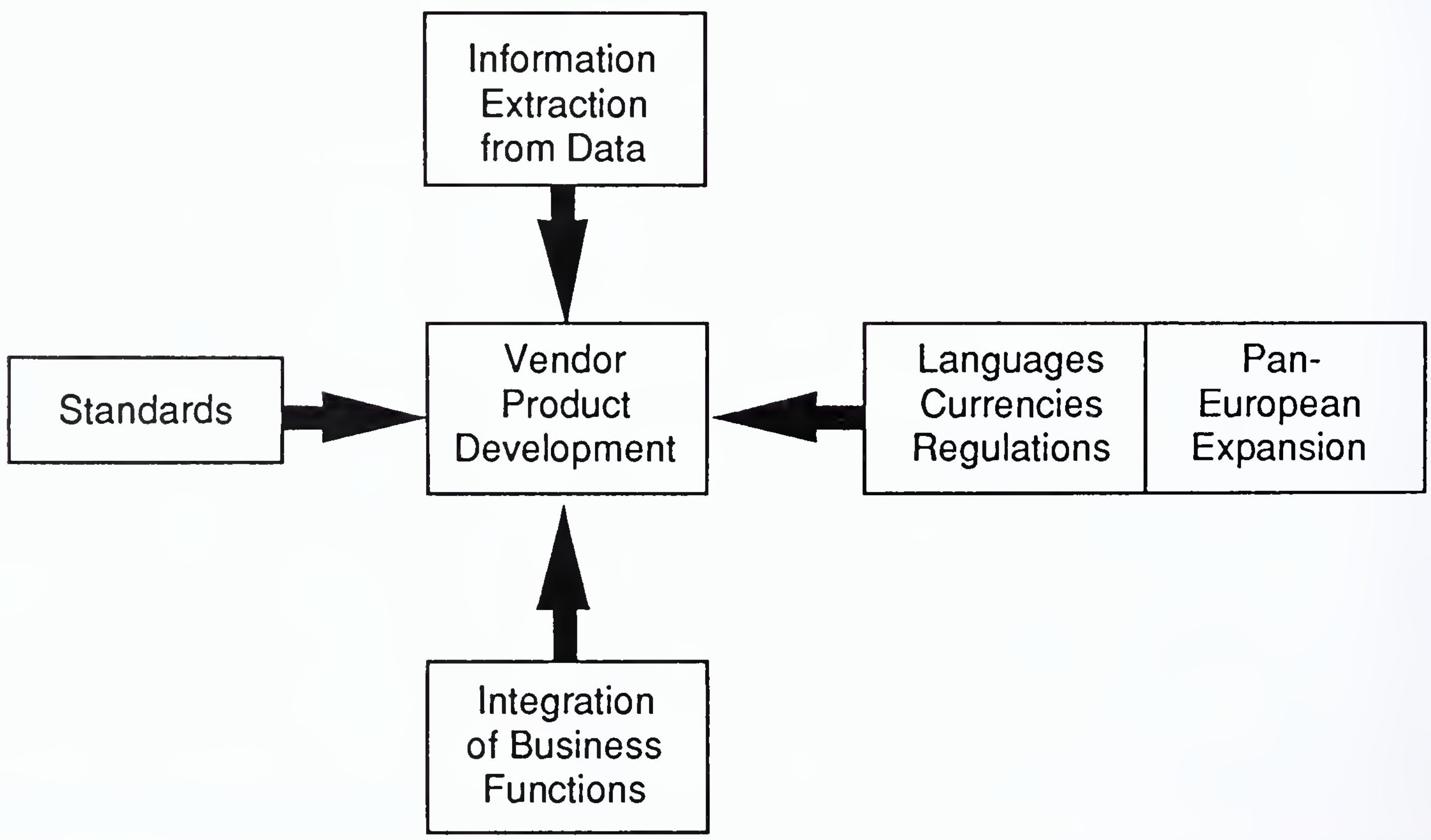
Applications Solutions Opportunities Western Europe, 1990-1995

Vendors of software applications solutions need to be aware of their buyers' selection criteria and need to know the commonest causes for complaint. This information can give your company a competitive edge, because you will know where to concentrate your efforts. INPUT's report, *Applications Solutions Opportunities—Western Europe, 1990-1995*, will provide this information. It discusses a number of user issues:

- Criteria in the purchase decision
- Support
- Documentation
- Functionality
- Errors
- Integration

The more that supplier companies understand users' issues, the more likely they will be able to satisfy users' requirements.

INTEGRATION: The Key to the 1990s



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Competitive Environment

INPUT's report also provides you with valuable competitive information about vendors' views towards the Single European Market.

Vendor Issues

There are many issues facing applications vendors in the next decade. Vendors need to have a clear strategy towards standards, for example. Users are tending to move away from dependence on equipment vendors' operating systems, preferring an independent solution which allows greater portability across equipment platforms. There is also increasing acceptance of Systems Application Architecture (SAA). In some markets, adherence to SAA is vital. INPUT's report provides vital information in this area to help you plan your future strategy.

Users are now typically experienced buyers of packages, often in the second or third implementation of a system. This means that users are becoming more sophisticated in their demands, needing solutions that can integrate several of their business functions. Vendors must be able to offer products that can be integrated with existing systems. Products also need to be flexible to enable additional packages to interface with them in the future.

REPORT CONTENTS

Market Forces

- The applications solutions product market
- Vertical and cross-industry markets
- Application software products
- Turnkey

Competitive Environment

- Market structure
  - application software
  - turnkey vendors
- Market consolidation

Application Areas

- Banking and finance
- Insurance
- Manufacturing
- Accounting
- Human resources
- Planning and analysis

Vendor Challenges

- Quality
- Integration
- Industry standards
- The single European market

Recommendations

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Trends in Processing Services—Western Europe, 1990-1995

THE 1990s WILL BRING A MAJOR RESTRUCTURING OF THE TRANSACTION PROCESSING MARKET.

Use INPUT's report to

- Evaluate the effect of restructuring in the market.
- Learn important country differences—essential if you are intending to set up a pan-European infrastructure.
- Discover the technological issues driving and inhibiting the market.
- Discover how end-user pressures are changing the market—essential for meeting clients' requirements.
- Find out how to adapt your service to remain competitive in the 1990s .

Despite a decline in growth rate in the processing services sector over recent years, there are still opportunities worth over $7.8 billion.

Processing Services—A Sector Facing Change

The processing services market will undergo a major restructuring in the 1990s, and it is vital for European vendors to know what effect this will have on them, so that they can plan ahead.

INPUT's report *Trends in Processing Services—Western Europe, 1990-1995* describes the current market climate and highlights market differences in 13 European countries. These changes will affect all country markets, but will be particularly significant in Scandinavian countries where processing accounts for a relatively large market share. The market will also be affected by the impact of these changes on the captive revenues of the closed user-group processing centres in Germany and Scandinavia.

The availability of more software on faster and cheaper hardware platforms has led to a decline in the growth rate in the processing services sector of the European software and service market. However, INPUT believes that there are still significant opportunities available for vendors.

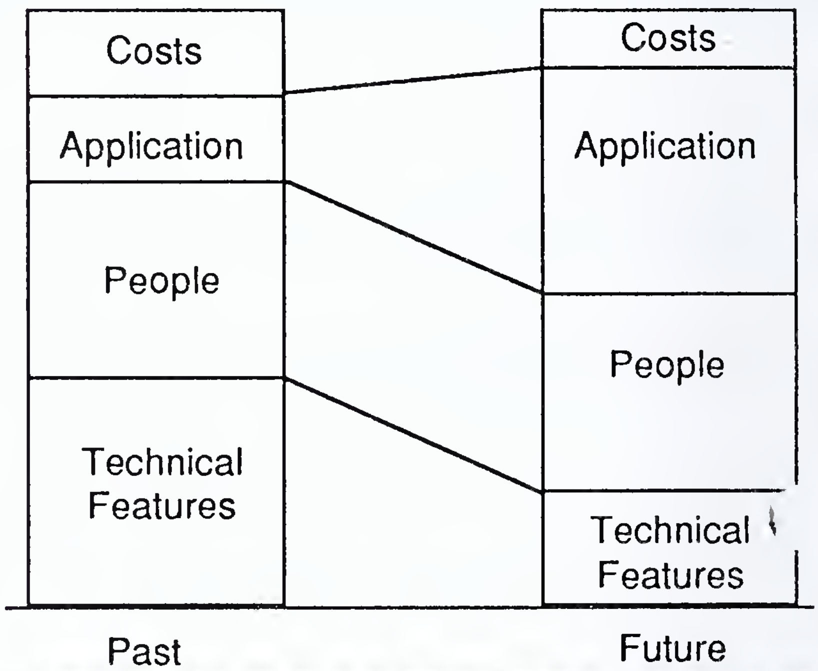
The report provides valuable guidance in a market—because of a marked decline in growth—where it is particularly important to be informed about opportunities.

INPUT's report provides the following:

- Vendor rankings according to 1989 revenues, by country
- Percentage of market share for each vendor
- Forecasts for growth—1990-1995—for Western Europe as a whole and by country

This data is invaluable for assessing the country markets that provide the best opportunities and

Evolution of Competitive Edge



for tracking competitors. The report also describes factors influencing each country market.

Service Concept

The processing services market is becoming more competitive, as vendor companies are not only competing with each other, but also with IS departments of user organisations. There have been significant changes in the processing environment from the batch processing and timesharing services of ten years ago. It is now crucial for vendors to diversify into other areas. INPUT's report discusses some specific applications and recommends strategies for extending capability into new applications—for example, how payroll processing can be developed into a human resources system.

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Trends

INPUT's report discusses the technological issues affecting the market, such as:

- Cost/performance ratio of equipment
- The effect of workstations and UNIX
- The effect of higher-level languages and their potential to enable users to solve systems problems in-house.

The above issues could be viewed as threats to the processing services market. INPUT's report describes how to turn these potential threats into opportunities.

User Base

The user base for processing services is changing as a result of European deregulation—merger and acquisition activity is creating larger companies seeking larger markets and greater efficiency. Vendors are having to adapt in the same way as the client base.

Find out:

- How deregulation in Europe is affecting the user base and forcing vendors to adapt accordingly
- Whether outsourcing is a reality, or whether the reverse is true—a return to in-house processing
- Which issues vendors view as particular challenges
- The essential elements of successful transaction processing

REPORT CONTENTS	
Market Forecast	
• Market Size and Forces • Regional Differences	
Country Markets	
• Austria • Belgium • Denmark • Finland • France • Germany • Italy	• Netherlands • Norway • Spain • Sweden • Switzerland • United Kingdom • Rest of Europe
End-User Environment	
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Network Support—
A Customer Service Opportunity

INPUT's Report Will Help You to Work Out Your Strategies for Network Servicing

It will provide you with:

- market size for 1990 in Europe and the USA
- market forecast for 1995 and growth rates
- recommendations on how to develop network servicing

and will discuss:

- user and vendor issues
- the likely future development of networks
- the impact of future developments on service

The network servicing market is confused and badly defined

Accurate market information is therefore essential for success

The Challenge of Network Service in

Criticality of Data Networks Demands Full Service Solutions

Data communications networks are now becoming critical to user organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. Users are left exposed in a vital area of their information systems infrastructure, as only a few vendors offer comprehensive approaches to network support.

A Confused Market

There is a high degree of confusion in the network servicing market. One of the problems is that there are differences of opinion over what comprises a network; users tend to take a wider view of networks than vendors. It is essential, therefore, that vendors involved in this market should be aware of these differences in order to understand the needs of their clients. INPUT's report identifies these issues.

Market Inhibitors and Drivers

The report, *The Challenge of Network Service in Customer Services*, discusses the forces inhibiting the growth of the market. One of these is the reliability of the equipment which reduces the requirement for maintenance and hence the opportunities for vendors. Also, there is a relatively high percentage of users who opt for self-service (usually large and experienced users) and around one-third of users do not recognise the existence of a formal network service contract. Vendors need this type of market size and growth information in order to plan their strategies.

The report also identifies the driving forces for network servicing, such as:

- a growing user base
- many new applications

Report Contents

Market Opportunities

- Market forecast and growth
- Competitive environment
- Service opportunities
- New skill requirements

Key User Needs

- User networking
- Network service requirements:
  - access
  - small users
  - inexperienced users
  - service needs
- Future user requirements
- Systems operations
- Source of service
- User comments

The Vendor Challenge

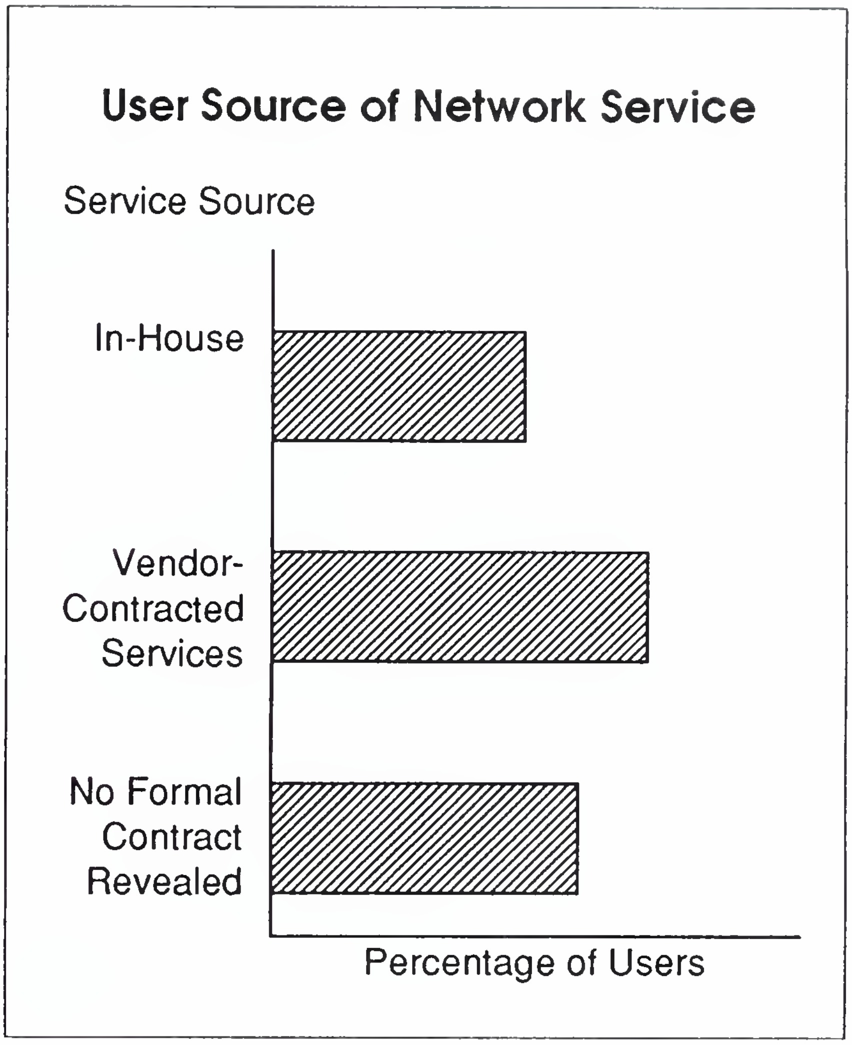
- Network development
- Key vendor issues:
  - multivendor environment
  - wider range of skills
  - software compatibility
  - wider range of service
- Service development:
  - standards
  - intelligent buildings
- Opportunities:
  - network disaster recovery
  - network implementation
- Vendor recommendations

Customer Services

Guidance for Vendors

INPUT has studied the market for network servicing and has assessed its potential growth and direction. As a result of this, INPUT has formulated some recommendations for vendors. These cover the new skill areas that INPUT believes vendors need to acquire to be able to take on multivendor network installations. The nature of these installations calls upon skills that are very often outside the traditional domain of customer service. INPUT has also carried out research into user attitudes. Vendors need to know users' views if they are to fully satisfy the needs of their clients. One important user requirement is for access to the network on demand, which implies a need for early detection of potential network problems.

This is an important strategic report for marketing and planning executives. It will help you to position your company for the 1990s.



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Customer Service Organizations—How to Recover from Declining Equipment Revenue Growth

- Companies must reduce dependence on low-growth markets in order to survive in the 1990s.
- Typically, 75% of customer service revenues are provided by equipment maintenance, which is growing less than 4% per annum.
- Use INPUT's report to find out how to enter systems operations and disaster recovery markets using existing skills and resources.
- Find out how to develop the service into a complete 'total solution' package.

- Systems Operations
- Disaster Recovery

The key to declining equipment revenue growth

Systems Support Opportunities for Customer Services Vendors in Western Europe, 1990-1995

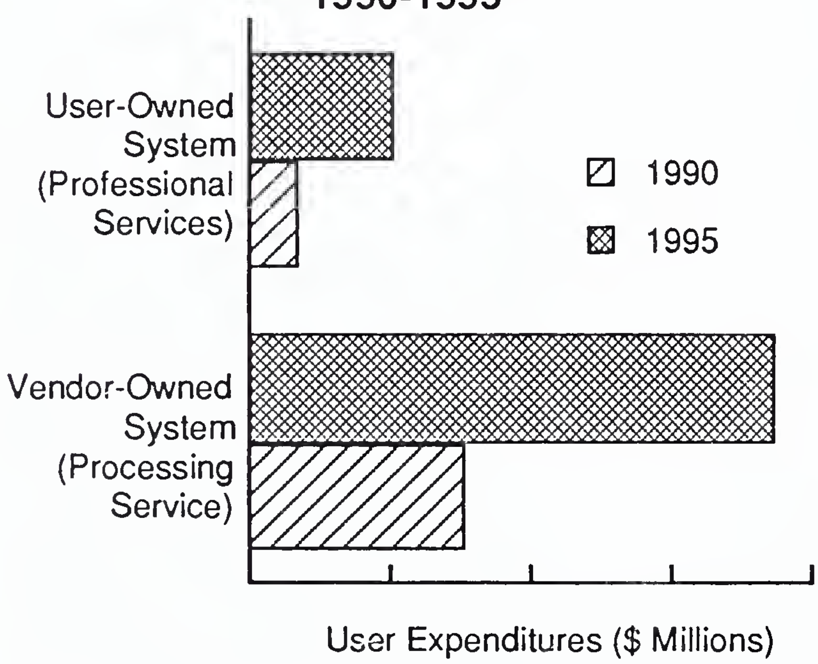
Are you interested in finding out how to increase your revenues by 20%, rather than depending on the current low growth rate for equipment maintenance revenues?

INPUT's new report on systems operations (facilities management) and disaster recovery can help you achieve higher growth.

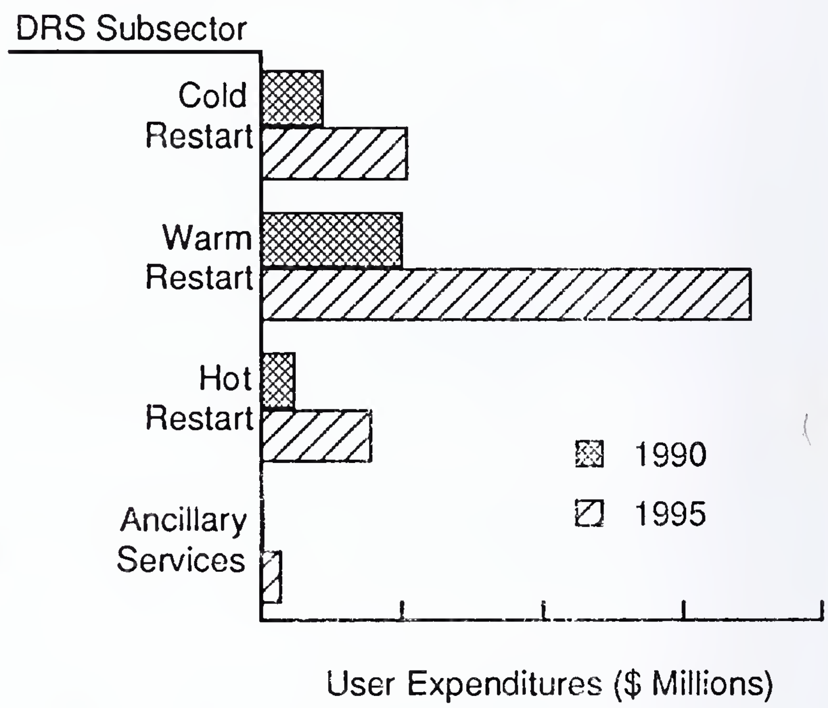
Entitled *Systems Support Opportunities for Customer Services Vendors in Western Europe, 1990-1995*, the report addresses the issue of falling growth rates from equipment maintenance revenues and gives valuable strategic guidance on entering two new markets:

- Systems operations
- Disaster recovery

Western Europe Systems Operations Market Growth 1990-1995



Western Europe Disaster Recovery Services Subsector Market Growth—1990-1995



INPUT believes that these markets are available to customer service organisations almost immediately, using existing skills and resources. INPUT's report puts forward a strategy for entering each market, providing you with vital information such as:

- Size of unpenetrated market
- Market segmentation
- Competitive environment
- Market size and growth forecasts by country
- User levels of interest

Disaster Recovery

INPUT believes that the disaster recovery market offers good growth potential, as it is currently relatively unpenetrated and there is a high level of user interest. The increasingly high reliance on computer equipment within industry is also driving the market, as users realise the effect that a disaster could have on their business operations.

INPUT's report gives valuable information on this market. It breaks the market down into three sectors:

- Cold restart
- Warm restart
- Hot restart

INPUT's report will tell you which sector is growing the fastest and will highlight some of the differences in the major country markets.

The report also warns of possible pitfalls to avoid when setting up a disaster recovery service, and lists essential elements that a disaster recovery service should contain. This is essential information for companies traditionally deriving revenues only from maintenance activities.

Systems Operations

The systems operations market is slightly different from that of disaster recovery. User levels of interest are lower, but the market is less penetrated. INPUT divides the market into two sectors:

- User-owned equipment
- Vendor-owned equipment

INPUT's report explains user attitudes to this service and describes the choices available to vendors when setting up a systems operations service. It describes two strategies and tracks the probable future development of each. The report can be a valuable contribution to planning for companies considering entering this market. By adopting INPUT's strategy, companies can reduce the need for substantial investment in a market that is traditionally costly in terms of skills required.

Service Packaging

The report discusses this important future challenge: to be able to be a client's sole provider of service for all computer equipment, taking care of not only the maintenance, but also the operations, contingency planning and consultancy.

REPORT CONTENTS

Revenue Growth Opportunities

- The Need for New Markets
- Market Opportunities
- Packaging Total Solution Service

Systems Operations Opportunities

- Drivers and Inhibitors
- Participants
- Competitive Pressures
- Country Market Forecast and Growth
- Service Strategies
- Problems Management Leverage
- User Attitude
- Need to Market
- Vendor Challenges

Disaster Recovery Service

- Drivers and Inhibitors
- Participants
- Country Market Forecast and Growth
- Subsector Definitions and Market Growth
- Level of Service
- Vendor Opportunities
- Potential for Success
- Stimulating Interest
- Service Packaging
- User Interest Levels

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Information Services Industry
Canadian Information Services Market Forecast, 1990-1995

- A Multiclient Study
- Offered Exclusively by INPUT
- Project Launch—July 1990

Canadian Information Services Market Forecast, 1990-1995

Need for Information

As a market for information services, Canada is unique. Geographically the second largest country in the world, Canada's population is only 10% that of the U.S. Seventy-four percent of the largest companies and more than 85% of the primary markets are concentrated in a small geographic area.

Starting from a small base, Canada's information services market is projected to grow significantly. Previous INPUT research suggests a growth rate averaging 20% per year. But this could change.

With the U.S.-Canada free trade agreement in force, an increasing number of U.S. companies are seeking to increase their presence in Canada. At the same time, Canadian companies sometimes indicate a preference for dealing with Canadian companies.

Instabilities resulting from the Canada/Quebec constitutional situation could affect growth of the market, at a time when national investment is being made to increase Canada's position in the world's economy.

Numerous organizations have indicated a need for information about trends in the Canadian information services market. INPUT's research will analyze the market, providing a forecast for the five-year period from 1990-1995. As part of the study, INPUT will analyze factors that could drive the market higher or inhibit growth. The report will also identify major technology trends.

Service Delivery Modes

- Processing Services
- Network Services
- Software Products
- Turnkey Systems
- Systems Integration
- Professional Services
- Systems Operations

Methodology

INPUT will conduct in-depth interviews of both vendors and buyers of information services.

- These surveys will provide vital information on r expenditures, planned growth rates by specific service delivery modes (e.g., processing services, professional services, etc.), market driving forces and issues.
- Other sources of information will be utilized to supplement the primary research. Trade associations, government agencies, industry consultants and reliable trade and business publications will be used as sources to build the Canadian forecast data base.

Scope of Study

INPUT's study of the Canadian information services market will include an analysis of seven (7) delivery modes and fifteen (15) industry segments.

The report will provide insight into technology status, driving forces, trends, issues and overall business conditions.

Industry Segments

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Communications
- Retail
- Wholesale
- Banking/Finance
- Insurance
- Medical
- Services
- Education
- Federal Government
- Provincial/Local Government
- Cross Industry

- Proven quality control methods will be employed to ensure the highest quality of information.

INPUT's Credentials

INPUT has...

- The strongest information services market analysis team in the world
- Conducted research in all major worldwide marketplaces
- A ten-year history of producing high-quality U.S. and Western European market forecasts and analyses using a standardized and proven set of market definitions
- Developed a proven research and forecasting methodology enabling timely forecast and analysis turnaround.

Study Audience

- Information services vendors who are considering entering the Canadian information services market
- Established Canadian vendors wishing to enter new markets or to accurately measure market shares of providers in the Canadian market.
- Planners who need to understand the scope of specific market opportunities within specific delivery modes and industry segments.

Study Timing

- Study will commence upon full sponsorship; expected commencement date: July 1990.
- Research/analysis will be conducted during July, August and September.
- Results are planned for presentation at a subscriber seminar in October in Canada. The specific location of the seminar will be determined later.
- The final report will be delivered to sponsoring companies 30 days after the subscriber seminar.

Schedule of Fees (U.S. Funds)

$9,500 with order and payment received by INPUT on or before August 1, 1990.

$10,500 with order and payment received by INPUT after August 1, 1990.

PROJECT DELIVERABLES
Market Forecast Report
• Seven service delivery modes • Five-year forecast, 1990-1995 • Fifteen vertical market segments • Key technology trends • Industry leaders
Presentation of Findings
• Presentation in Canada
Forecast on Floppy Disk
• Lotus 1-2-3

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If You Need to Know What's Going On in Government Systems Integration . . .

- ▲ Pressure to redesign aging systems
- ▲ Changing agency requirements
- ▲ Pressure to share risks
- ▲ Pressure to do more with less
- ▲ Attacks on the *concept* of systems integration

You need INPUT's latest comprehensiv
The *Federal Systems Integration Market*,

You can have a report that explains in detail the crucial dynamics of the Federal Systems Integration market today.

And if you act before February 28, 1990, you'll pay $150 less than the standard list price— a savings of 10%!

Federal Systems Integration Market, 1989-1994
• Market Analysis and Forecast • Agency Requirements • Systems Integration Vendors • Key Opportunities
Agency Perspective
• Hardware Systems • Systems Applications • Agency Perceptions • Case Studies of Contracts • Acquisition Plans and Preferences • Projected Trends
Vendor Perspective
• Vendor Participation • Vendor Market Perceptions • Vendor Contracting Views • Trends

A brand new revision of INPUT's respected survey, *Federal Systems Integration Market, 1989-1994,* gives executives who must sell into this market invaluable intelligence tailored specifically to their needs—and to the needs of a gigantic market in a state of flux.

The rules for successfully penetrating this market will never be the same. INPUT's new report tells you how they've changed, and helps you turn those changes to your advantage.

Of course the report gives you a broad market overview, seasoned with the combined experience and expertise of a research staff that knows more about how Washington works than any other computer market research firm. But the report also gets down to the nitty gritty, giving you detailed analyses of:

- What the requirements of the different agen s are today, and how they are likely to change over time;
- Who the major players are in federal systems integration, and how they can give flexible competitors new opportunities for increasing market share; and
- When and how the major contracts will be put out to bid, and who will be involved.

And that's not all...

Six Ways the Market Is Changing

The report also details the six major pressures on the federal systems integration market, and explains how they are acting in concert to change the way you have to do business:

- **Pressure for Improved Productivity**—The overall constraints of the Gramm-Rudman budget axe and the increasing scrutiny of information systems expenditures could seriously affect you. The report offers an analysis.

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Dear Colleague:

Marketing systems integration products and services to the federal government just got a whole lot easier.

INPUT recently released the newest edition of its respected survey of the Federal Systems Integration Market, 1989-1994. This publication is written for just one audience: marketers who must master the intricacies of this evolving market. The report clarifies the complex trends, changing policies, and shifting growth rates of government systems integration—and then offers clear recommendations for future action.

Systems integration is growing fast. In fact, it is one of the star segments of the government market. But the influence of budgetary concerns, new policies, scarce personnel, and changing agency requirements make the market's growth anything but easy to exploit.

INPUT's report offers guidance: timely data, some difficult-to-obtain market intelligence, and a lot of clear recommendations for making the most of this vast opportunity.

So order the report today. Make the most of it!

Yours sincerely,

John E Frank

John Frank
President, INPUT INC.

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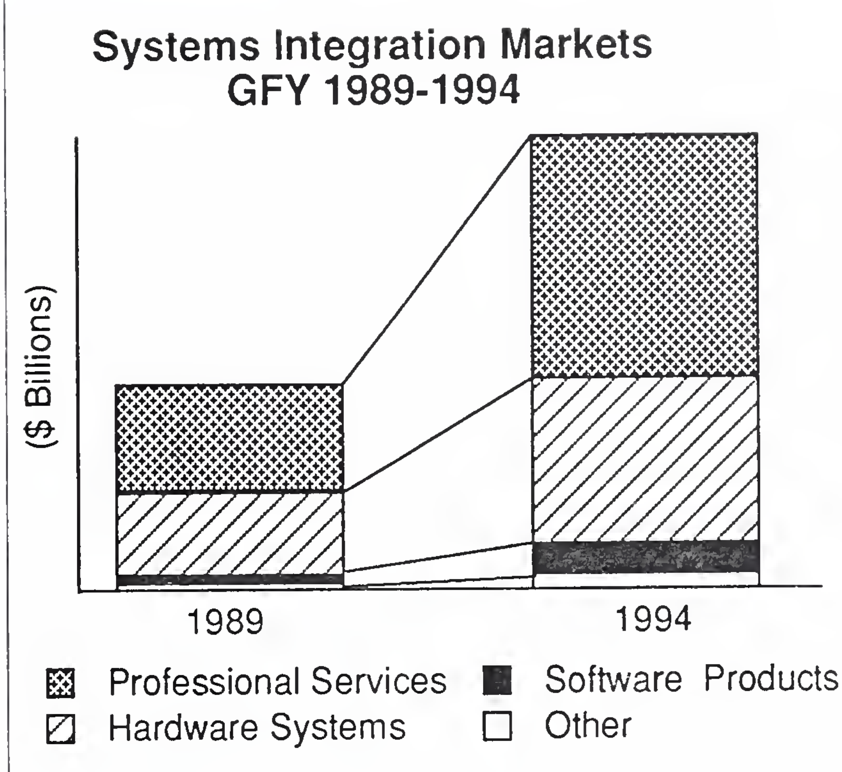
urvey, 1989-1994

- **Pressure to Redesign Aging Systems**—Government hardware and software systems are patchworks with no integrated design. That means tremendous opportunities for systems integration work, which the report analyzes in some detail.
- **Pressure to Overcome Staff Shortages**—Government agencies are having a hard time hiring and retaining qualified technical staff, so they must offload technical work onto the private sector. INPUT's report discusses how you can turn this trend to your advantage.
- **Pressure to Maintain Fair Competition**—The entire process of awarding contracts has slowed significantly. INPUT offers some insight on how to avoid the worst delays, and how to minimize their impact on your company.
- **ressure to Share Risks**—Agencies now want vendors to assume some of the financial risk of large systems integration contracts. The report analyzes how this problem could affect your operations, and offers guidelines on risk-sharing.
- **Pressure to Justify Integration**—Recently, the GSA characterized systems integration as a "Grand Design" and suggested that it would not work. INPUT surveys the market's response.

How To Cash In

The game has definitely changed. There's a new emphasis on project teams, joint ventures, subcontracting, budgeting, and project management. And above all, there is an overwhelming need for vendors to understand the details of the procurement process and how they can affect the bottom line.

Executives that understand how all of these changes are working to change their businesses can make intelligent decisions in the new Federal ystems integration market, which is forecast to grow at a rate significantly faster than other technology markets over the next five years.



OVERALL GROWTH is useful information, but knowing which segments are growing fastest can help government marketers more. INPUT's report gives differential growth rates for the most important market segments.

And INPUT's *Federal Systems Integration* report gives you all the information you need to make those decisions today.

Why not fill out the enclosed order form and send it in today?

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Identify and Assess Opportunities in the Rapidly Changing DLA Market...

Defense Logistics Agency Information Services Market

This report will help you develop:

- FORECASTS for the market opportunities at DLA for the next five years by understanding the factors affecting DLA information systems modernization
- COMPETITIVE STRATEGIES in this market based on a thorough knowledge of the competitive environment—leading suppliers, shares, and strategies
- Sales approaches to the DLA that take into account the agency's procurement policies, procedures, and vendor preferences
- MARKETING PLANS that consider major initiatives, acquisition plans, and budget trends

This report contains:

- Market forecasts through 1995 for major market segments
- Procurement procedures and trends
- Budget trends and other funding issues that will impact the market
- Recent and upcoming initiatives
- Complete background and organization of the DLA

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The Key to Success in DLA Information Strategic Information on Acquisition Plans and Trends

This new study, *Defense Logistics Agency Information Services Market,* was undertaken to keep you up to date with the rapid changes in DLA information systems acquisition practices.

Defense Logistics Agency Information Services Market
• Systems Operations • Telecommunications • Software Products • Professional Services • Processing Equipment • Computer Equipment • Office Information Systems • Electronic Data Interchange (EDI)
Agency Perspectives
• Agency Overview • Major Information Systems Acquisition Plans • Acquisition Plans and Procedures • Vendor Preferences • System Integration Trends • Centralized/Decentralized Directions • Use of IS Vendors
Vendor Views
• Contracted Services Changes • Contract Functionality • Contracting Views • Marketing Perceptions

We Unravel the Opportunity

The report focuses on providing you with a clear picture of the agency—its organization, mission, and directions—along with strategies on how to plan for and conduct business in this market. This report gives you the information you need to establish successful marketing strategies and to select addressable opportunities in DLA information services. The report summarizes the major DLA initiatives and programs and the markets they will affect.

The report examines agency requirements, preferences, and perceptions that impact contractors of information systems and services. Current DLA purchasing patterns and procedures are also covered in the report.

We Provide Hard Analysis of the DLA Market

The report provides a comprehensive market analysis of the DLA's potential. We forecast the information services market by delivery mode, and identify the critical market issues and budgetary and economic trends that are guiding market growth. Special attention is devoted to analyzing how the agency is striving to modernize in the face of continuing budget cuts. User trends, such as increasingly decentralized computing, are also examined.

Services—

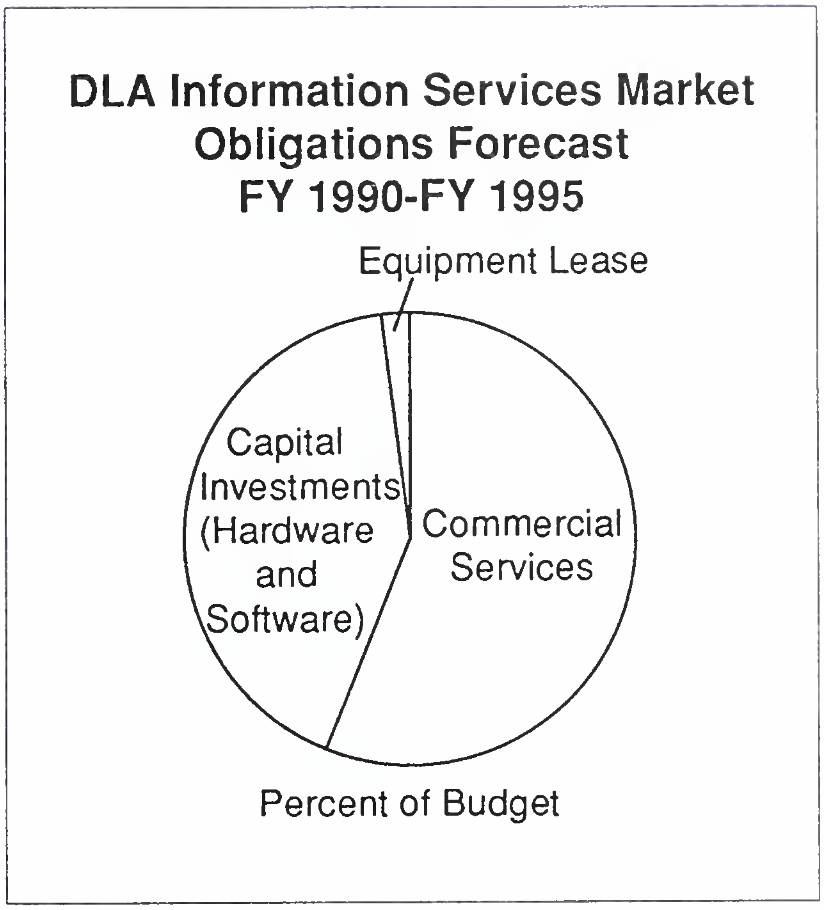
The report provides forecasts for the following vendor service modes at DLA: hardware, software, professional services, integration services, systems operations, processing services, telecommunications, office information systems, and EDI.

Based on Information From the Field

This report is based on information collected in an extensive INPUT survey of agency representatives and vendors. Data collected from ncy and government sources and leading vendors summarizes current status and views on:

- Future use of information systems
- Strategies and market perceptions
- Important vendor characteristics and services

As a comprehensive analysis of the important competitive factors and considerations in the DLA market, this report is an indispensable planning tool to information services executives and managers who want to take advantage of DLA opportunties.



Who's buying, and what they spend, is just one kind of market data provided in this report.

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How to Find and Manage the Market Opportunities in Federal Processing Services and Systems Operations...

Federal Processing Services/Systems Operations Market, 1989–1994

This report will help you:

- FIND specific agency opportunities in this market
- DEVELOP marketing strategies and services that will bring agency business
- IDENTIFY competitors and potential teaming partners
- REFINE your bidding and pricing strategies to maximize profitability
- IMPROVE agency satisfaction with your services

The report contains:

- Market forecasts through 1994
- Agency requirements and purchasing trends
- Competitive analysis
- Recommendations

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Develop Your Successful Strategic/Market Plan from Our In-Depth Industry Coverage

The federal government market for processing services and systems operations is experiencing new growth. The federal government's increasing reliance on information technology to improve productivity and accomodate staffing inadequacies provides numerous opportunities for vendors that supply transaction processing, batch, and operational support services.

Federal Processing Services/ Systems Operations Market
Market Analysis and Forecast, 1989–1994
• Historical Perspective • Budgetary Constraints • Software Integration and Productivity Improvements • Artificial Intelligence • Leading Vendors
Federal User Requirements and Trends
• Problems and Issues • Budget and Application Distribution • Agency Perceptions • Acquisition Plans and Preferences • Projected Trends in Processing Services and Operational Support
Competitive Trends
• Vendor Participation • Vendor Market Perceptions • Vendor Contracting Views • Trends • Recommendations
Key Opportunities

This new report from INPUT, *Federal Processing Services/Systems Operations Market, 1989–1994*, shows you where and how to compete in the federal market for operational support. This report is a comprehensive analysis of the factors driving this market's growth, providing strategies needed to succeed in the intensifying competitive environment. It answers the important questions you have about this market.

Why is the federal processing services/systems operation market growing?

This report presents INPUT's analysis of the federal market for processing services and systems operations (operational support). It analyzes how market growth is being encouraged by the increasing versatility of processing services and operational support and the trend towards automation of government operations.

The report identifies the market segments and applications that will grow rapidly and the markets that will experience slower growth. The growth of systems operations is a focus of this report. The report also discusses the factors that will sustain the market despite its maturity and budgetary constraints, including the government's facilities limitations and its efforts to modernize and improve efficiency.

How do I market to the various agencies?

Vendors in this market need to maximize their marketing efforts towards current and future government requirements in key applications. By analyzing the types of functions government agencies are contracting out, this report helps to focus your product and service offerings in h growth segments.

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The report also explores marketing and sales issues unique to the federal government, including procurement policies and preferences, vendor selection criteria, and planned uses of contractor services in operational support.

What are the most appropriate pricing strategies in this market?

Successful pricing strategies are vital to capitalize on agency opportunities in this market. The report includes recommendations on how to improve margins and gain competitive advantage through cost controls and alliances.

The report identifies the leading vendors that have established significant shares of the federal government's processing services and systems operations market. Hardware, software, and service vendors can use the report to identify specific agency opportunities, possible teaming partners, and appropriate bidding strategies.

Features and Benefits of this Report

This study is based on interviews with agency officials and vendor representatives, as well as data collected from published government sources. (Agency program data and updated vendor information was collected by INPUT during 1989.)

The survey illustrates the views, in both the government and the industry, regarding:

- Current and future agency use of processing services and systems operations
- Leading vendors and performance evaluations
- Strategies
- Issues and trends

Federal Market Pressures

- Staff shortages
- Labor-intensive process
- Mission contracting
- Cost-cutting
- High attrition

Federal Processing Services/Systems Operations Market, 1989–1994 is a complete assessment of agency requirements, competition, and evolving trends and issues. It provides market intelligence to marketing and planning executives to assist them in developing successful marketing plans, assessing capabilities, and analyzing the competition in contractor-supplied processing services and systems operations.

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If You Need an Edge in the Federal Financial Systems Market...

- ✦ Where are the major active procurements right now?
- ✦ Where are the financial systems growth areas?
- ✦ Will Reform 88 ever affect you?
- ✦ What are the impacts of the JFMIP?
- ✦ Who are the dominant competitors, and what are they doing?

...INPUT Can Show You Exactly Where the Opportunities Are!

The federal financial systems market is one of the government markets with the highest potential for explosive growth.

And INPUT has just published a new report titled *Federal Financial Systems Market, 1990-1995*, designed to give you the competitive advantage that comes with targeted intelligence on agency requirements, legislative impacts, and where the major procurement opportunities are.

At full price, it is an exceptionally cost-effective way to concentrate your resources on only the best available opportunities.

And if you act before November 5, you'll pay $95 less than the regular list price for the report—a savings of 10 percent!

The report contains two kinds of information that you cannot find anywhere else in such a concentrated form. The first is in-depth analysis of this market, including all the factors now working to enhance its growth.

And the second is specific, tactical information on what the procurement plans of the major agencies are, how big they are, when the RFPs are due, and what the selection criteria are likely to be.

The kinds of tactical questions covered in the report include:

- Which seven federal agencies represent the hottest current opportunities for financial software vendors, either at the RFI or RFP level?
- What criteria are used to evaluate financial system vendors, and how do they differ from agency to agency?
- How important are custom programming services to agencies needing financial systems?
- What strategies have Computer Data Systems Incorporated and KPMG Peat Marwick used to sell in the federal market? Why have they been successful where others have failed?
- Which firms not currently on the GSA schedule may become significant competitors in the future, and why?
- How can strategic alliances help you penetrate the financial systems market?

And other questions concerning the types and sizes of opportunities for financial systems procurements by agency.

The Highest Possible Returns

As you know, the laws of supply and demand sometimes do not have the most influence on which agencies buy which financial systems in the federal market.

Other forces, including attempts at standardization, agency requirements, legislative initiatives of one kind or another, attempts at reform, and the constriction of federal budgets sometimes predominate.

Federal Financial Systems Market, 1990-1995

Market Analysis and Forecast

- JFMIP Background
- Financial System Standardization Measures
- Agency Awareness of Regulations
- Impediments to Vendors
- Budget Constraints and Software Procurement alternatives
- Procurement Opportunities
- Market Forecast
- Conclusions and Recommendations

Competitive Considerations

- Current Software Vendors
- Future Software Vendors
- Impact on Hardware Vendors

Key Opportunities

- Financial Systems Opportunities by Agency

Federal Financial Systems Market, 1990-1995 analyzes these forces in detail, bringing to bear INPUT's tremendous research resources and our staff's decades of experience in the federal maze on such questions as:

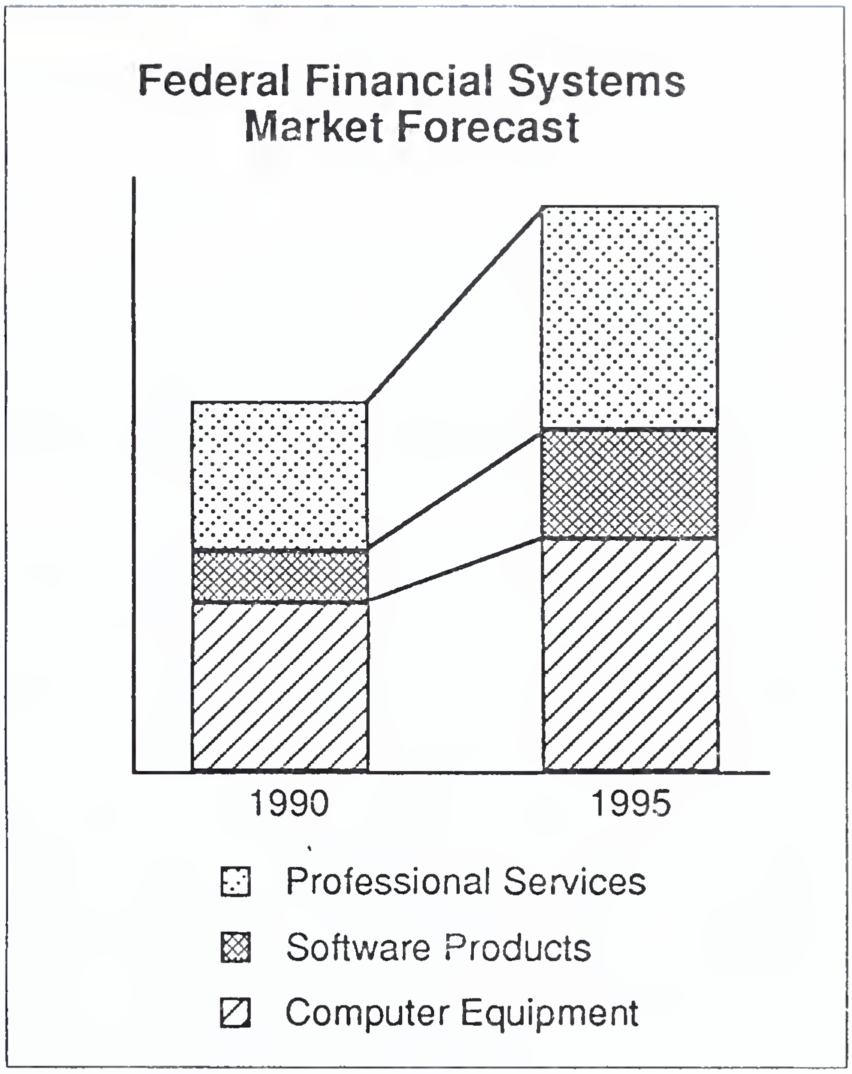
- How big is the market for federal financial systems, and how fast is it growing?
- Which delivery modes (professional services, software, and computer equipment) represent the best growth opportunities?
- Which procurement mode do most agencies use for obtaining core-compliant software?
- How can you use the Joint Financial Management Improvement Program (JFMIP) to help you penetrate this market?
- How big is the market for federal financial systems? How fast is it growing? Which category (professional services, software, equipment) is growing fastest?
- How have GAO audit targets affected the market for financial systems?
- How will the Financial Integrity Act of 1982, Reform 88, OMB Circular A-127, and GAO Title 2 affect your selling in these markets?
- How are some agencies getting around the requirements for core-compliant financial software?

INPUT goes into all of these subjects—and many others—in depth, so that you can understand how the larger market forces are affecting financial systems procurements, and can concentrate your sales and marketing resources where they will yield the highest possible returns.

Concentrated Intelligence

The information in this study represents months of research, including interviews with key agency procurement officers and an exhaustive search and analysis of vast numbers of federal documents related to financial systems procurement. And all of it—surveys, interviews, search, and analysis—have been tempered by our unmatched experience in uncovering opportunities in one of the most complex markets in the world.

The result is five chapters of concentrated intelligence that can help you target the best procurements—intelligence that would be impossible for you to duplicate on your own.



SIZE AND GROWTH RATE DATA for three key segments of the Federal financial systems market are shown in this graph, which is typical of the kind of information contained in the INPUT report.

But you don't have to. Because to get the same results—to get all of the benefits of one of the most sophisticated research efforts ever conducted in the federal market—all you have to do is ask.

So use the enclosed order form to ask for your copy of *Federal Financial Systems, 1990-1995* today.

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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If You Need Specific Intelligence on Opportunities in the Federal Computer Equipment Maintenance Market . . .

- What are specific agencies' procurement plans through 1995?
- How do buyers evaluate maintenance vendors?
- How big is the market, and how fast is it growing?
- What are successful competitors doing?

... You Need the Latest Report from INPUT!

INPUT has released a new report entitled *Federal Equipment Maintenance Market, 1990-1995* that identifies and analyzes hundreds of millions of dollars worth of federal computer equipment maintenance contracts through GFY 1995.

And if you act before January 25, 1991, you'll pay $175 less than the regular list price for the report—a savings of 10 percent!

Federal Equipment Maintenance Market, 1990-1995
Market Analysis and Forecast
• Current Market Conditions • Market Structure • Market Forecast • Federal Market Issues • Competitive Environment • Leading Agencies
Federal User Requirements and Trends
• Agency Hardware Environment • Performance Requirements • Agency Acquisition Plans and Preferences • Agency Satisfaction with Vendor Performance • Trends
Competitive Trends
• Vendor Participation • Vendor Perceptions • Discounting and Alliance Practices • Maintenance Contractor Selection Criteria • Trends
Key Opportunities
• Present and Future Programs • Equipment Maintenance Opportunities by Agency

If pinpointing procurements was all it did, this report would be well worth such a moderate price. After all, you have to have this intelligence if you are going to know where to deploy your sales, marketing, and engineering resources to make the most of these multimillion-dollar opportunities.

But INPUT does more than just flag pending procurements.

Answers

The report puts this specific information in the context of both the larger forces shaping the market, and the tactical considerations you cannot afford to ignore. Its purpose is to give you answers to all of the major questions you have to address, including:

- To buyers selecting maintenance providers, what is the relative importance of performance and contract cost?
- How do buyers weight other factors in their decisions, such as reputation, cost control procedures, proposed technical solution, and contract type?
- How big is the equipment maintenance market, and which segments are growing fastest?
- How can you shape your business to turn budget constraints, computer obsolescence, the new emphasis on competition, multivendor installations, and widespread microcomputer penetration to your advantage?
- Who are the leading vendors in federal equipment maintenance, and what strategies are they pursuing?

And other information that lets you shape effective strategies for exploiting all kinds of equipment maintenance opportunities for the next five years.

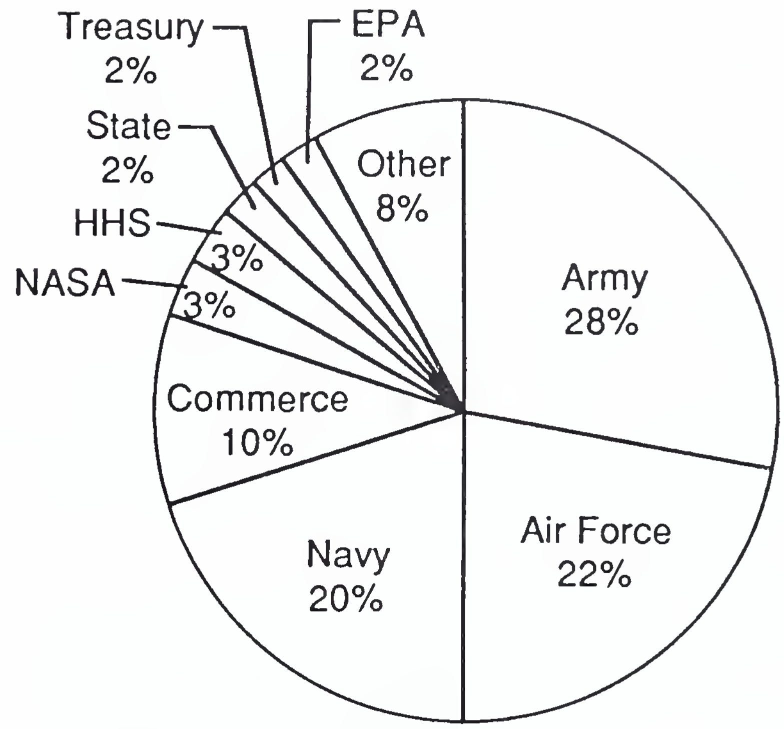
A Competitive Edge

In addition to this large-scale analysis, INPUT's report concentrates on providing specifics on pending procurements together with information on agency practices and competitive trends. And that gives you an edge on companies without access to this kind of in-depth, informed analysis. The report answers questions about:

- Which agencies have obligated the largest expenditures to equipment maintenance over the last two years?
- What is the total number and dollar value of large and midsize systems installed at federal agencies?
- What is the average age of the installed base, by agency?
- What percentage of federal users employ third-party maintenance organizations? OEMs? In-house maintenance services?
- What are the present satisfaction levels of agencies with their maintenance services? What areas do they say need improvement?

And 86 specific agency procurement opportunities, including PAR reference, RFP schedule, and funding for GFY 1990-1995, where known.

INPUT is able to provide some of this information to you through a careful analysis of the OMB/GSA Five-Year Plan submitted in compliance with OMB Circular A-11, budget requests, and other documents. But we have also tapped sources for information not available to the general public, including the Five-Year Defense Plan and supporting documentation.



INPUT IDENTIFIES THE LEADING AGENCIES for purchase of equipment maintenance products and services. This is only one kind of market research available in the report, which includes market analysis and forecast, competitive trends, key opportunities, and user requirement data.

The result is a distillation of millions of words of federal procurement verbiage into a single, clear, and concise volume that pintpoints opportunities and offers a means of exploiting them. This is a powerful competitive weapon in a market where having the right information at the right time can make all the difference.

So use the enclosed order form to get your copy of *Federal Equipment Maintenance Market, 1990-1995* today.

About INPUT

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When You Have to Know the Specifics on the Federal Telecommunications Market...

- ✦ How big is the market and how fast will it grow?
- ✦ Which are the key buying agencies?
- ✦ What are users looking for?
- ✦ Which agencies are awarding contracts now?
- ✦ What is the competition like, and how can you beat it?

You Have to Have INPUT's New Federal Telecommunications Report!

INPUT has just published a new report on the federal telecommunications market that gives you the specific market intelligence you need to understand overall trends, identify lucrative contract opportunities, and avoid competitive pitfalls.

And if you act before January 31, 1991, you'll pay $175 less than the regular list price for the report—a savings of 10 percent!

Federal Telecommunications Market, 1990-1995
Market Analysis and Forecast
• Federal Market Forces through 1995 • Vendor Market Share and Competition • Technological Impacts • Policy and Regulatory Prospects
Agency Requirements
• Key Players in Regulations, Standards, and Policy • Agency Plans and Perspectives • Technology Trends
Implications of FTS 2000
• Status of Cutover • Service Scope Issues • Agency Understanding and Acceptance • Vendor Perceptions and Prospects
Competitive Trends
• The Marketplace • Federal Telecommunications Vendors • Vendor Federal Telecommunications Market Plans and Concerns • Recommendations
Telecommunications Opportunities
• Present and Future Programs • Recent Telecommunications Awards • Telecommunications Opportunities by Agency

The report, entitled *Federal Telecommunications Market, 1990-1995*, offers detailed insights into where the opportunities are *today* in this kaleidoscopic market. What can you do to benefit from FTS 2000? Which agencies are buying? What market forces are working against you, and what can you do about them? The report answers all of these questions, and many more on every aspect of selling these complex products and services to the government.

Understanding Market Trends

The report first gives telecommunications vendors detailed forecasts for growth through 1995 for the market as a whole and for four major market segments: Leased Telecommunications, Professional Services, Telecommunications Hardware, and Network Services.

With this as a cornerstone, the report then builds a complete foundation for your marketing plans to help you educate agencies about your products and services, and to help you understand the many forces driving or inhibiting market growth:

- What kind of impact will FTS 2000 have on you now that it is being implemented?
- How do the standardization of GOSIP and the increasing interconnect abilities of federal systems affect the long-term prospects for growth?
- How will agencies' desires for E-mail and EDI affect prospects for real growth?
- Does the present budgetary climate affect those prospects?
- How can you minimize the impacts of lengthy acquisition processes?
- How large is the market today, and how will it change over the next five years?
- Which segments will grow fastest? Slowest?
- What proportion of the market is made up of leased telecommunications services, professional services, network services, and hardware?
- Who are the major competitors in this arena, and what are they doing right?

The report also offers an entire chapter devoted to the impacts of FTS 2000 on agency procurement plans, standards adoption, and market opportunities.

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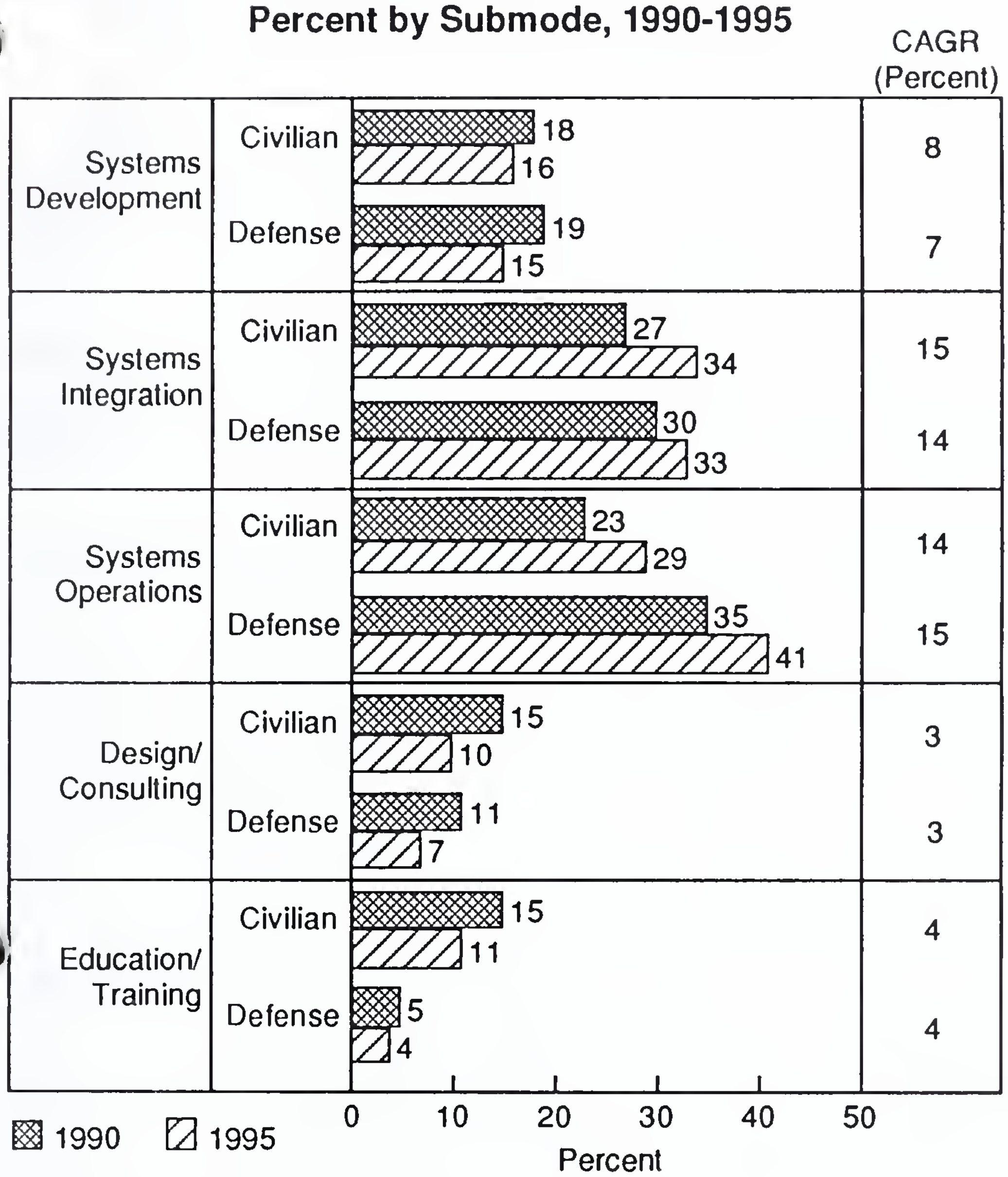
Federal Professional Services Telecommunications Market Percent by Submode, 1990-1995



IN ADDITION TO PINPOINTING federal user requriements and contract opportunities, the report offers detailed analyses of market segments by submode, giving vendors a crystal-clear picture of where the market opportunities are.

Highlighting Opportunities

In addition to detailed analyses of the forces that shape the telecommunications markets, the report devotes chapters to addressing questions of user requirements and actual telecommunications contract opportunities that have immediate and significant impacts on your day-to-day business:

- What are the major trends in the requirements of federal users?
- Which vendor characteristics are becoming more important to users? Less important?
- Which agencies are the key telecommunications users, and what are their buying plans for the next five years?
- What will their leasing expenditures be for GFY 1990 and 1991?
- What are their preferred methods for acquiring new or enhanced telecommunications?
- What are the specific trends in spending for voice, leased circuits, VANs, hardware, and software?
- What are the 51 most recent telecommunications contract awards? Who won them? What is their dollar value?

The report also discusses other opportunities compiled from INPUT's exhaustive research into the A-11 submissions to OMB, the OMB/GSA/NIST Five-Year Plan, and documentation not generally available to the public, such as the Five-Year Defense Plan.

INPUT's research team, with decades of experience in federal telecommunications, has interviewed the major players, read the regulations, and combed the RFPs. And now they are putting the results of their labor at your fingertips in a single, concentrated volume of sharply focused research into this dynamic market

INPUT's *Federal Telecommunications Market, 1990-1995* gives you the market intelligence you need to compete successfully. Use the enclosed form to order your copy today.

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If You Need Help Reducing Risk In Large Systems Integration Projects . . .

- ♦ What is the crucial factor for successful program management?
- ♦ What kind of change control mechanisms do you need?
- ♦ How can you ensure successful communication?
- ♦ How do users evaluate vendors' program management skills?

...You Need INPUT's Report on *Program Management in Systems Integration*

A new report from INPUT can give you a significant advantage in one of the fastest-growing segments of the computer industry—the market for systems integration.

And if you act before April 30, 1990, you'll pay $200 less than the regular list price for the report—a savings of 10%!

Program Management in Systems Integration is INPUT's analysis of the increasingly important role program management skills are playing in today's complex systems integration contracts.

The demand for systems integration is growing. Connectivity has become a survival issue in U.S. corporations. Companies are rebuilding their information systems' infrastructures. And applications are growing more complex at the same time they are required to interoperate.

Program Management in Systems Integration
The Systems Integration Process
Vendors' Program Management Processes
• Program Management in the Business Acquisition Process • Program Management Systems • Systems Integration Program Managers
Buyers' Experiences with Program Management
• Vendor Selection and Interface • The Program Management System • The Program Manager • Communication and Change Management • Tools and Methodologies • Buyers' Experience Summary
Conclusions and Recommendations

These trends represent tremendous opportunities for systems integrators. But they also pose significant challenges.

As a result, program management skills are becoming the competitive edge in systems integration.

Critical Elements of Program Management

INPUT's report details the critical elements of a successful approach to program management, including:

- The importance of involving the actual program manager as early as possible in every phase of the contract, from acquisition through implementation to testing and installation;
- The role of risk analysis and management;
- The need to capture the activities involved in typical systems integration contracts as repeatable processes;
- The creation of the necessary sense of partnership between users and vendors;
- The overwhelming importance of communication, and the ways and means of keeping all communication channels open among all parties; and
- The fundamental and growing requirements for qualified, competent, and experienced program managers.

In addition, *Program Management in Systems Integration* gives the results of detailed surveys of large users and vendors of systems integration to allow readers of the report to analyze directly the commentary and reactions of the people actually providing and buying these services.

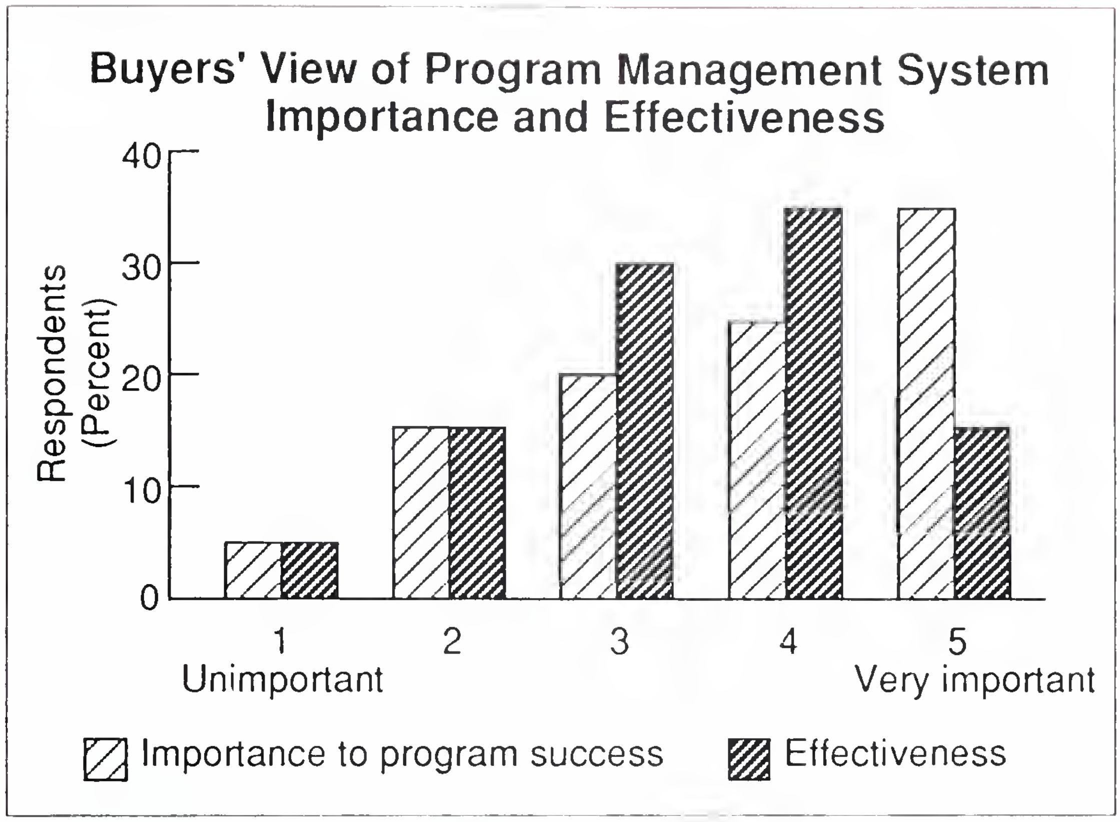
The report addresses these crucial marketing issues:

- Why do users buy systems integration service

- ■at role does program management play in the selection of given vendors?
- What is the relative importance of actual users and internal IS organizations in the selection process?
- How can vendors educate their market about the importance of program management tools and methodologies?
- How do users rate systems integration offerings, and how do they evaluate the program management component?

And more…

INPUT also gives readers insight into the size of the total market for systems integration and its projected growth through 1994, as w■■s the size and growth rate for 14 ..■portant vertical industry markets.



HOW BUYERS RATE the importance and effectiveness of program management systems shows the gap between the actual and perceived value of these systems.

Put It To Work for You

To round out its intelligence offering, *Program Management in Systems Integration* provides users and vendors both with a comprehensive set of recommendations:

- How to identify and qualify systems integration prospects;
- How to develop proposals even when client specifications are incomplete;
- How to involve the program manager so as to minimize risk and maximize impact;
- How buyers can develop comprehensive specifications to control scheduling and costs;
- How buyers can increase their satisfaction by obtaining details of vendors' program management plans; and
- ■■w buyers can specify the introduction and management of change.

Program management has become a crucial component of systems integration contracts. And its importance will only increase as the complexity of these contracts grows.

INPUT's report gives you objective, detailed intelligence on program management to help you manage systems integration efforts more efficiently, and to reduce the risks inherent in these projects.

Systems integration offers tremendous advantages. *Program Management in Systems Integration* helps convey them to both vendors and users.

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European Software and Services Markets

Industry Sector Studies

Identify Specific Opportunities In Your Target Markets

INPUT's reports on the five key industry sectors of the European software and services markets can help you identify specific opportunities in your target markets, keep ahead of trends and prepare for growth. You can use these reports to help plan your future strategy in each industry sector. You can find out which markets are growing fastest, which companies are active in each major country market and what is driving and inhibiting market growth.

INPUT has researched the following sectors in the major European markets of France, U.K., Germany and Italy:

- Banking and Finance
- Insurance
- Retail and Wholesale Distribution
- Discrete Manufacturing
- Process Manufacturing

Each report contains discussions of important issues and developments in each industry sector and the implications of these for software and services vendors.

The research reveals how each industry sector will be changing over the next five years—essential information to help vendors improve their performance in these markets.

INPUT's reports provide you with forecasts for expenditures in each industry sector for the following delivery modes:

- Processing Services
- Professional Services
- Systems Integration
- Software Products
- Turnkey Systems
- Network Services

Each industry sector report provides:

- market size and growth r[illegible] by:
  - country market
  - delivery mode
- leading vendors
- opportunities
- country market differences
- discussion of user issues
- future market outlook
- conclusions and recommendations

You can use these reports to gain valuable data on market size and to gain information on other companies active in the market, including market share information.

Banking and Finance Sector

INPUT's report describes the new opportunities arising in this exciting, fast-changing sector of the European software and services market.

The plan by the European Commission to deregulate financial markets by 1 January 1993 is forcing banking and finance organisations to restructure and at the same time, develop new products and services. The market is also becoming more and more competitive as banks and other financial institutions expand beyond their traditional market niches. The banking and finance sector comprises about 20% of the total software and services market, which represents a significant opportunity for vendors.

Merger and acquisition activity is also driving the market for software and services as new organisations seek to integrate their information systems and develop new ones.

You will learn about:

- the effect of the Single European Act
- opportunities in the banking sector
- opportunities in the securities sector
- the impact of UNIX
- the competitive environment

Insurance Sector

Deregulation, competition from banks and rapid technological development are some of the factors driving the insurance sector of the software and services market. INPUT's report can help you make the most of these opportunities by providing market size information, and discussions of user issues and developments in the industry that are affecting demand for software and services.

You can use INPUT's report to find out software and services expenditures in three sectors of the insurance market:

- life
- non-life
- re-insurance

Demand for software and services is also divided by platform:

- mainframes
- minis
- PCs and workstations

The insurance market is very fragmented, and to survive in a single competitive market, many insurance companies have been forming alliances. This has resulted in a market with distinct nationa[illegible] characteristics, which INPUT's report helps you identify.

Process Manufacturing Sector

INPUT's research shows that considerable opportunities are opening up for software and service vendors in the process manufacturing sector in Western Europe. While the process manufacturing sector has traditionally led the way in process automation at the shop floor level, companies have only recently discovered the benefits of production administration systems.

The result is a rapidly growing market in which there are few established vendors. However, many vendors are now entering the market and are faced with the challenges of both developing and marketing new products and services. The battle for market share in this sector will be intense over the next few years. To be successful in this market, vendors need accurate information on market size and competitive market shares. INPUT's report can provide you with the information you need to improve your performance in this specialised market sector.

Another complex aspect of this sector is the pronounced trend towards open systems and UNIX-based packages. INPUT's report describes the opportunities available for vendors in this area.

Discrete Manufacturing Sector

INPUT's research in the discrete manufacturing sector shows that partnerships between software and service vendors are becoming increasingly important in order for vendors to succeed in serving the European discrete manufacturing sector. Users are starting to move towards computer-integrated manufacturing environments, and vendors are unable to supply the full range of applications and services required. Accordingly, strategic partnerships are developing between vendors with complementary products and services.

This situation presents opportunities for many vendors, as these partnerships are no longer restricted to those between equipment vendors and application software product vendors. In particular, it provides the smaller players with a specialised product or skill the opportunity to take advantage of the marketing strengths of the major vendors.

INPUT's report can assist you in assessing the competitive scenario in the discrete manufacturing sector and can help you to plan your future strategies in this market.

Retail and Wholesale Distribution Sector

Achieving savings through faster product movement is the top priority driving investments in software and services for European distribution businesses. Changing business practices and the use of scanning EPOS (Electronic Point of Sale) terminals are also creating demand for new applications.

INPUT's report helps you identify these opportunities and provides a clear picture of the market developments and their effect on the software and services market.

This report provides information about wholesalers' and retailers' needs and what sort of systems they are seeking to implement.

INPUT's research has shown that there are significant differences among European countries in the structure of their local distribution markets, which leads to very different demands for solutions. INPUT's report explains these differences and their implications for software and services vendors.

INPUT's report also identifies five stages of IS development, defining how far IT has extended its influence within a distribution company. Organisations are classified by which stages they have reached to improve targeting and development planning by vendors and users. While most vendors are promoting stages 2, 3, 4 and 5, most users are still struggling to implement stage 1.

INPUT's report helps you understand this development process.

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If You Need Answers to Questions Like "How Big Is the Software Market in Japan?"...

- ▲ Worldwide Market Figures and Forecasts
- ▲ Data By Country and By Region
- ▲ Analysis of Forces Driving or Inhibiting Market Growth
- ▲ Hard Data on Economic and Political Climates
- ▲ Strategic Recommendations for Worldwide Marketers

...INPUT's *Worldwide Market Forecast, 1989* -

- How big is the worldwide market for information services?
- How fast is it growing overall?
- Where are the best opportunities for businesses providing different kinds of products and services?

INPUT's newly released *Worldwide Market Forecast, 1989-1994*, is the result of a major, multiclient research project designed and implemented specifically to give you the answers to these kinds of questions.

Worldwide Market Forecast 1989-1994

Regional Summaries

- Asia/Pacific, Latin America, Middle East/Africa
  - Regional Economic/Political Setting
  - Environmental Factors
  - Regional Services Forecast
  - Market Entry/Expansion Considerations
- Europe, North America
  - Regional Economic/Political Setting
  - Regional Services Forecast
  - Competitive Environment

National Service Profiles

• Argentina	• Australia	• Austria
• Belgium	• Brazil	• Canada
• Denmark	• E. Europe	• Finland
• France	• Hong Kong	• Italy
• India	• Japan	• S. Korea
• Mexico	• Netherlands	• New Zealand
• Norway	• Other Asia	• Other W. Euro.
• Singapore	• Spain	• Sweden
• Switzerland	• Taiwan	• United Kingdom
• United States	• Venezuela	• W. Germany

Worldwide market data is notoriously difficult to get. The geography, language barriers, problems with consistent definitions, communications breakdowns, cultural differences, and other reasons all make reliable worldwide market information rare.

And extremely valuable.

INPUT has developed a methodology that has allowed us to circumvent these problems. The new report, based on the study, contains information from more than 1,100 interviews, all of them conducted in the native language of the interviewees, concerning market data, trends, and conditions in thirty countries and geographic regions around the world. Some examples:

- The trend toward industry-specific and country-specific software is now driving much of the market for minicomputer and microcomputer software products. INPUT's analysis shows how you can turn this trend [illegible] your advantage.
- Developing countries represent significant market opportunities for companies that can make long-term commitments. INPUT tells you why.
- Cultural differences blunt the effectiveness of many companies' promotion and pricing policies. INPUT gives examples of how greater creativity can yield tremendous dividends.
- Technocentricity and cost consciousness may be valuable in the U.S. markets. But how about in a market where personal relationships can be as important as functionality or price? INPUT outlines some ways to shape sales strategies to local market characteristics.

And more...

INPUT

1994, Was Written for You!

The report, based on the study, focuses INPUT's research expertise onto user requirements for information services in seven delivery modes:

- Processing Services
- Network Services
- Applications Software
- Systems Software
- Turnkey Systems
- Systems Integration
- Professional Services

Using this information, market and strategic planners can derive valuable insights into market sizes and dynamics for various product types.

The worldwide market forecast report also cuts these data by five major geographic regions:

- North America
- Europe (Western and Eastern)
- Asia/Pacific
- Latin America
- Middle East/Africa

Using INPUT's report, marketers can determine the relative size and growth rates of any of the above delivery modes in all of these regions. This gives them a powerful and convenient tool for taking the pulse of any market of interest.

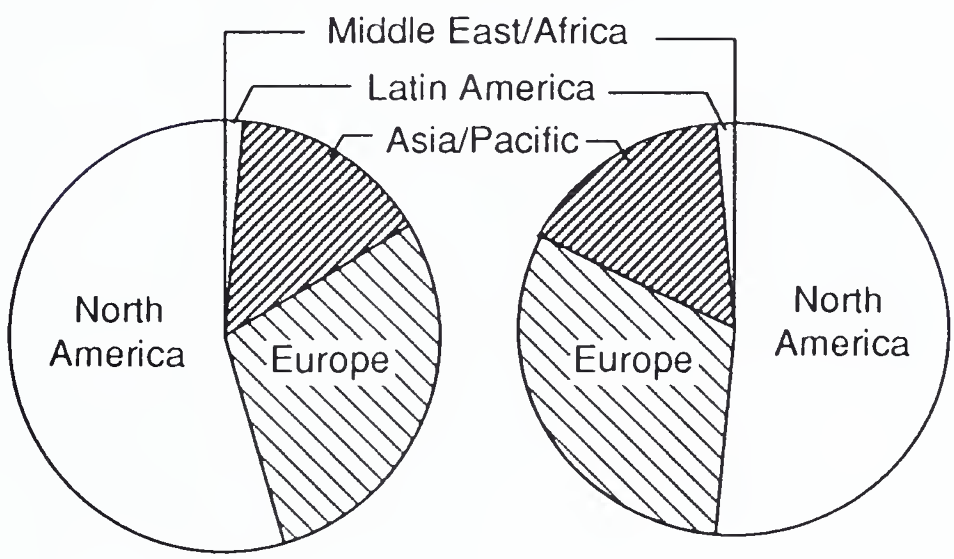
In addition, INPUT provides a profile for each of the geographic areas analyzed that considers significant factors that could affect the market for information services:

- The Economic and Political Climate
- Key Technology Trends
- Forces Encouraging the Growth of Information Systems
- Forces Inhibiting the Growth of Information Systems
- Profiles of Major Service Providers
- An Analysis of Factors Affecting Market Entry or Expansion

With the worldwide market for the information systems and services headed for $400 billion by 1994, the value of targeted, firsthand market intelligence is clear. And that's exactly what INPUT's *Worldwide Market Forecast, 1989-1994,* gives you.

So use the enclosed Order Form to get your copy today! It's a small investment in a powerful competitive tool.

Worldwide Market Distribution 1989 vs. 1994



Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Software and Services Industry

Customer Service Program—Europe

Customer Service Program—Europe

- **Customer Service Market Report**

  This report presents analysis and forecasts of user expenditure for service for each market sector. It examines key customer service issues and identifies trends and opportunities in the marketplace.

- **Customer Service User Requirements Report**

  Customer Service User Requirement Reports focus on customer satisfaction with vendor service performance. Three reports are produced:

  - Large Systems
  - Midrange Systems
  - PC/Standalone Workstation

CUSTOMER SERVICE ISSUE REPORTS

The 1990 Program includes four special issue reports as follows:

- **Local-Area Network Support**

  This report addresses the service needs of this burgeoning area and examines vendor responses to rapidly changing user needs.

- **Independent Maintenance**

  INPUT continues to track the fast-growing independent maintenance sector in this report which examines user attitudes to independent maintenance as well as vendor activity.

- **Customer Service Pricing**

  This report examines customer perceptions and trends in pricing for both hardware maintenance and systems software support and maintenance.

- **Professional Service Opportunities**

  Increasingly, customer services operations are providing additional people-related services. This report examines the developing high-growth opportunities ancillary to the prime equipment support functions of customer service.

INPUT®

EFFECTIVE PLANNING FOR EFFECTIVE PERFORMANCE

INPUT's Customer Service Program provides the detailed customer service information you need to forecast service requirements, analyze competition, and address the challenges of new technology.

You receive research-based studies and support services which address questions such as:

- What services do your users really require and how can you meet their needs most efficiently?
- What is the competition doing and how should you respond?
- Where are the sources of service revenue growth for the next five years?
- How will increases in hardware reliability and software complexity affect your personnel mix?
- What are the new service techniques and how are they being received in the marketplace?

CLIENT SUPPORT

- Access to INPUT Consultants

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- **On-Site Visits**

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- **Client Meetings**

  Regular meetings, held in various European locations, enable clients to meet others in a small, informal group. INPUT consultants update clients on the latest market developments and there is ample time for discussion.

- **Monthly Customer Service Newsletter**

  Topical news is provided about customer service in Europe and the U.S. (e.g., new vendor service policies, service offerings, vendor performance).

RELATED SERVICES

- Customer Service Program—International covers the U.S. hardware and software maintenance and support industry.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.

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INPUT®

Software and Services Industry

Market Analysis Programme—Europe

Market Analysis Programme—Europe

- **Forecast and Analysis Summary Report**

  This report provides a complete summary of INPUT's analysis and five-year forecast for the computer software and services market in each European country covered.

MARKET SECTOR REPORTS

- **Processing Services Markets**

  Analyses the markets for processing services in Western Europe and examines key trends and issues for the market sector.

- **Professional Services Markets**

  Professional services represents one of the major components of the computer software and services business, but is facing key challenges in areas such as quality and the use of information engineering techniques. This sector report examines the market opportunity in Western Europe.

- **Application Solution Markets**

  Increasing user demand for more complete and comprehensive solutions is driving the market for application software products and support services. This report examines the markets for software application products and turnkey systems.

- **Systems Software Product Markets**

  The functionality of system software continues to increase to meet user demand for more sophisticated computing environments on intrinsically more powerful equipment platforms. This market sector report identifies and analyses the opportunities within the Western European market.

INDUSTRY SECTOR REPORTS

- Five key industry sectors within the Western European computer software and services market will be examined in this series of reports. Market analysis and forecasts for each sector will be provided, together with an assessment of key sector issues and trends. These sector analyses will be provided for the four major country markets of Western Europe—France, West Germany, the United Kingdom and Italy. Other country markets will be covered for an additional fee. The five industry sectors to be covered are:

  - Manufacturing—Discrete
  - Manufacturing—Process
  - Banking and Finance
  - Insurance
  - Distribution (Retail & Wholesale)

INPUT®

PLAN FOR SUCCESS

INPUT's Market Analysis Programme is a service that provides timely and accurate intelligence on the computer software and services markets, some of the fastest-moving markets in the world. How much you know about them and when you find out could spell the difference between profit and loss for your firm.

USE THIS POWERFUL SERVICE

This powerful service for tracking and anticipating market trends provides the information you need, including:

- An incisive view of European information services markets
- In-depth analysis of the dynamics of the user and competitive environments
- Invaluable advice for vendors seeking to address or re-evaluate their strategy for market opportunities
- Market size data

RELATED SERVICES

- The Vendor Analysis Programme provides company profiles and support data on European vendors.
- Market Analysis Programme—U.S. covers the computer software and services markets in the U.S.
- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.

CLIENT SUPPORT

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INPUT®

Information Services Industry

Market Analysis Program—U.S.

Market Analysis Program—U.S.

INFORMATION SERVICES—A $200 BILLION OPPORTUNITY

The U.S. market for information services is now at the $100 billion level and will reach nearly $200 billion by the end of 1994.

INPUT's Market Analysis Program provides a unique set of services to help you **succeed** in this dynamic and fragmented market.

YOU AND THE COMPETITION

Users can be served through a variety of delivery modes, and each industry uses a different mix of information services. Competition for these services is keen, and the capabilities and directions of competitors are important aspects of a vendor's business plan.

INPUT continually assesses the competitive position and market strategies of the leading information services firms in the U.S. and Canada.

INPUT FOR YOUR MARKET PLANNING

INPUT's Market Analysis Program provides the following **market analysis reports** to help you understand and capitalize on this important market:

Industry/Market Sector Reports—Specific industry sectors are examined in this series.

Delivery Mode Reports—Five delivery modes are also analyzed in depth.

HOW DO YOU BENEFIT?

- Comprehensive analysis of your markets
  - What drives demand for your services?
  - How big is the market/how fast is it growing?
  - Who is the competition/what are they doing?
- High-quality support
  - Senior professional staff
  - Frequent contact with key vendors and users
  - In-depth research and analysis
  - Constant interaction with clients

REPORT CONTENTS

Industry/Market Sector Reports contain the following information for each sector covered:

- **Industry/Market Definition**
  The market structure is defined and demographic data presented (number of firms, segmentation, growth rates, etc.)
- **Trends and Issues**
  Key business and technology trends that affect the sector are identified. Emphasis is on user issues and the way that changes in business operations affect the sector's use of information technology.
- **Market Forecast/Analysis**
  Forecasts are presented for each delivery mode. Factors that affect demand are identified and related to key applications in the sector.
- **Competitive Environment**
  Leading vendors are profiled and market sha[illegible] indicated for each delivery mode.
- **Conclusions and Recommendations**
  Specific recommendations are made for competing effectively in this sector.

Delivery Mode Reports provide a cross-industry analysis of the trends, opportunities, and competitive issues in specific service areas. Each delivery mode is broken out into several submodes, with market forecasts structured by industry, hardware platform, and other applicable categories. Typical issues addressed include:

- **Processing Services**
  - In-house vs. processing services trade-off
  - Impact of distributed data bases/processing
- **Network Services**
  - Applications and delivery mechanisms
- **Software Products**
  - Relationship to other "application solution" markets (processing services, turnkey)
  - Impact of standards (SAA, open systems)
  - Evolution of data base management systems
- **VAR/Turnkey Systems**
  - Pricing strategies and distribution channels
  - Maintenance and support requirements
- **Professional Services**
  - Contracting/alliance strategies
  - Relationship to systems integration market

INPUT®

CLIENT SUPPORT

In addition to these in-depth research reports, INPUT provides a wide variety of support services to its clients:

- **Research Bulletins**
  Periodic Research Bulletins give you INPUT's analysis of current issues and trends.
- **Access to INPUT Consultants**
  Clients receive continuous support from INPUT's consultants and executives. Call them for reactions, opinions, and ideas.
- **"Hotline" Inquiry Service**
  The "hotline" inquiry service supports small-scale research needs (requiring less than two hours) and provides clarification/amplification of report and presentation data.
- **On-Site Presentation**
  INPUT consultants present research results and industry forecasts at your site and relate this information to your specific service markets.
- **INPUT Conference**
  This conference updates INPUT's clients on key industry developments and trends, and provides a forum for discussions with INPUT senior staff and executives of other client firms.

RELATED SERVICES

Other services are also available to meet specific client needs:

- **Market Analysis Program (Europe)**
  Parallels U.S. program in the European market.
- **Systems Integration/Operation Programs (U.S. and Europe)**
  Provide detailed analysis of these two emerging delivery modes.
- **Vendor Analysis Programs (U.S. and Europe)**
  Provide profiles and support data on information services vendors in North America and Europe.
- **Custom Research and Consulting Services**
  INPUT's professional staff is available for a variety of projects, including strategic planning, competitive analysis, specialized market/product evaluation, and merger/acquisition support.

PROGRAM DESCRIPTION

INDUSTRY/MARKET SECTOR COVERAGE

- Banking and Finance
- Insurance
- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Wholesale Distribution
- Retail Distribution
- Utilities
- Telecommunications
- Technical/Business Services
- Medical
- Education
- Federal Government
- State & Local Government
- Miscellaneous Industries
- Cross-Industry Applications

DELIVERY MODE COVERAGE

- Processing Services
- Network Services
- Software Products
- VAR/Turnkey Systems
- Professional Services/Systems Integration

CLIENT SUPPORT SERVICES

- Research Bulletins
- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Presentation
- Client Conference

- **Consultant Presentations**
  INPUT consultants provide presentations and lead meetings or seminars for strategic planning, business development, etc.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

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INPUT®

Software and Services Industry

Network Services Program—Europe

Network Services Program—Europe

- **Network Services Market**

  This central report analyzes the Western European market for network services. This market sector includes managed network services and network applications. The report provides five-year market forecasts for the complete sector, broken down by market segment, and reviews major issues and trends.

- **Messaging Services: The Opportunity**

  Rapidly growing communications networks and application use are driving the need for network management capability. This report examines the service opportunities emerging in this marketplace caused by the convergence between managed and messaging network services. X.25 and X.400 technologies are discussed with reference to their importance in attracting corporate and industry sector network users. Extensive market forecasts for Western Europe are given for the forecast period 1990-1995.

- **Trade Data Interchange: Market Opportunities**

  Electronic Data Interchange (EDI) is center stage in the rapidly developing world of business-to-business communication and is the most talked-about of the trade data interchange applications. This report analyzes the Western European market for trade data interchange applications, examines key trends and issues and provides a five-year forecast of market size and growth.

- **Financial Network Services: Closing the Loop**

  One of the most important and rapidly growing areas for network applications is for financial network services. This report assesses the opportunities available for network services and software providers in this area. Major user and vendor issues are reviewed in order to highlight marketing and development opportunities.

- **EIS Market Development**

  The market for electronic information services (EIS), primarily on-line data base services, is one of the key areas in the rapid progress toward an "information" driven economy. This report identifies key opportunities and trends in this important market segment and presents a market forecast for 1990-1995.

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PLAN FOR SUCCESS

INPUT's Network Services Program is a continuing service that provides timely and accurate intelligence on a range of network service applications.

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RELATED SERVICES

- Multinational network studies provide information for planning and operating multinational telecommunications networks.
- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Western Europe.
- The Vendor Analysis Program provides company profiles and support data on European vendors.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.

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INPUT®

Software and Services Industry

Systems Management Programme—Europe

Systems Management Programme—Europe

This is a new INPUT Programme in Europe designed to provide computer services vendors with market analysis, forecasts and trend and issue analysis of two rapidly growing related market sectors that are becoming more closely related:

- Systems Integration
- Systems Operations (Facilities Management)

INPUT's new European research service provides vendors with up-to-date market data on user attitudes to the growing trend to outsource the management and development of their information system investments, and a thorough analysis of the key industry issues.

The structure of INPUT's 1990 client service is based upon a research programme containing six reports that are divided into two modules.

SYSTEMS INTEGRATION MODULE

- **Market Analysis**

  This report provides market analysis and five-year forecasts for the systems integration market in Western Europe.

- **Issues and Trends**

  This report focuses specifically on the commercial systems integration sector, examining issues facing both vendors and users in developing major application systems. Trends in the market are discussed giving insight to the needs of future market positioning.

- **Client Priorities and Vendor Strategies**

  This report examines the competitive environment and includes information on the major market vendors. It examines different vendor strategies and the priorities of the user community when awarding systems integration contracts.

SYSTEMS OPERATIONS MODULE

- **Market Analysis**

  This report provides market analysis and five-year forecasts for the systems operations (facilities management) market in Western Europe.

- **Issues and Trends**

  This report focuses specifically on the systems operations sector, examining the issues facing both the vendors and users in operating major systems facilities. Trends in the market are discussed giving insight into the key elements of future market strategies.

- **Client Selection Criteria and Vendor Strategies**

  This report examines the competitive environment and includes information on the major market vendors. It examines the major client concerns and selection criteria when entering into systems operations contracts.

THE SYSTEMS INTEGRATION OPPORTUNITY

Systems Integration (SI) is the provision of a total solution for complex information systems requiring multiple products and services. It is of strategic interest and importance to both users and vendors.

The urgency of large-scale project development requirements, the multivendor nature of engagements, the absence of acceptable off-the-shelf solutions and the user desire for single-vendor interfaces are all contributing to the shift to the SI approach. In this approach vendors take responsibility for systems development and implementation. This can also lead to systems operations contracts (facilities management).

INPUT's Systems Management Programme provides answers to the questions raised in this rapidly changing market. It is based on over 5 years of research into this area: INPUT characterised 'Systems Integration' in 1983 as the two magic words that could change the whole information systems industry.

RELATED SERVICES

- The Market Analysis Programme analyses the computer/communications software and services marekts in Europe and the U.S.
- The Vendor Analysis Programme provides company profiles and support data on European vendors.
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INPUT®

Information Services Industry

Systems Operations Program

Systems Operations Program

SYSTEMS OPERATIONS PROGRAM

Systems Operations (SO) is potentially the most revolutionary market of the 1990s. It is an outgrowth of facilities management—in which today's customers are buying much more than operation of their equipment. They are also buying complete operations of their computer and communications systems and in addition they participate in management and direction setting. Recent entry of large computer manufacturers and professional service companies has stirred new interest in this market and established SO as a strategic offering.

Management of large user corporations and institutions are recognizing that operations of information processing systems detracts time and energy from the development of mission critical systems—systems that can provide their organizations with a competitive advantage. They are turning over the tactical planning, management control and operations of their systems to SO vendors under long-term contracts.

Systems integration and systems operations are closely related. Systems integrators manage the development of new systems and systems operators manage and operate both new and existing ones. The authority assumed by these firms has changed the channels for distributing information products, and services. Vendors building or operating clients computers and communications systems control or influence acquisition of initial or additional products and services.

INPUT's Systems Operations Program provides answers to the questions in this rapidly growing and changing market. Over 15 years of experience tracking the issues, recommending strategies and forecasting growth for facilities management and other information services markets makes us well qualified to provide this service.

The Systems Operations Program described herein is a sister product to our Systems Integration Program. The two share a common market analysis report that examines the relationships between these two important markets. You should consider both programs; they can be packaged together, as they provide answers to the issues regarding the two key components of the "outsourcing" movement.

MARKET ANALYSIS REPORTS

Systems Integration and Systems Operations Market Analysis
This report examines systems integration (SI) and operations (SO) trends and issues in the U. S. domestic market. SI user expenditures are forecast for the next five years by vertical industry market, by type of SI (application, network and data), and by component (information processing equipment, software packages, professional services and associated services). SO user expenditures are also forecast by vertical industry market as well as by service mode (processing services and professional services). Particular attention is paid to commercial market opportunities, with the federal market treated as one of fifteen vertical markets. The federal market is covered in greater detail in a separate report.

Systems Operations Vendor Profiles and Analy
This report analyzes vendors within a competitive structure (hardware vendors, professional services firms, communications companies, aerospace firms and systems operations companies), and identifies similarities and differences in a variety of areas. These include: organization, financial characteristics, strategies and markets, capabilities and products. In-depth profiles of key vendors, including the industry leaders, are provided.

Network Management
There is considerable debate over user's willingness to employ an outside vendor to manage their telecommunications network. This report examines both user and vendor views of the issues and trends driving and/or hindering the growth of this market. A five-year market forecast is provided, leading vendors are identified, and an assessment of the importance of vendor capabilities in the buyer selection process is included.

Systems Operations Management Trends
This report identifies and examines the major trends and issues driving the systems operations market and the management practices used when participating in this market. Based on a survey of SO firms, it will identify the major management issues in the areas of personnel, client relations, security, investment, and performance measurement. It also discusses the methods employed by successful vendors to manage these areas.

INPUT®

CONFERENCES AND SEMINARS

Systems Operations Program Seminar
This seminar is an interactive working session which reviews and discusses the results of current research. Industry developments, client acceptance of SO, and marketing concepts are also discussed.

INPUT Client Conference
This conference updates INPUT's clients on key strategic industry trends and developments, and provides a forum for interaction with senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Systems Integration Program analyzes the opportunity for vendor-provided solutions to complex information, communications or automation requirements through the implementation of information products and services. INPUT provides SI research programs for both the U.S. and European markets.
- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS
• Systems Integration and Systems Operations Market Analysis • Vendor Profiles and Analysis • Network Management • Systems Operations Management Trends
SYSTEMS OPERATIONS PROGRAM SEMINAR
CLIENT CONFERENCE
CLIENT SUPPORT
• Access to INPUT Consultants • "Hotline" Inquiry Service • On-Site Visit

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours), as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

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INPUT®

Software and Services Industry

Vendor Analysis Programme—Europe

Vendor Analysis Programme—Europe

GUIDE TO A FRAGMENTED INDUSTRY

The information services industry is highly fragmented. It is also intensely competitive and has a rapidly changing market structure. Participating in this industry requires access to information and knowledge on vendors and their characteristics. Through the Vendor Analysis Programme, clients are able to satisfy this need.

The Vendor Analysis Programme is based on INPUT's 15 years of tracking vendors in the information services industry. It provides access to files on thousands of vendors and detailed profiles on hundreds of the most important companies.

Information from the vendor analysis programme is critical for competitive analysis and purchase, acquisition, and alliance decisions.

VENDOR PROFILES

Profiles of around 300 public and private information services vendors are the cornerstone of the Vendor Analysis Programme. Profiles focus on hidden vendors: divisions of large companies, private companies and small, fast-growing vendors. They include:

- General information (company name, address, telephone, chief executive's name, public/private status, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- Financial data, where available
- Revenue distribution by delivery mode
- Employee and organisation data
- Key products and services
- Industry markets served
- Geographic markets served

DIRECTORY OF INFORMATION SERVICES VENDORS

This is a directory of approximately 700 European information services vendors along with summary data. It is indexed by country market served and mode of services offered.

TYPES OF VENDORS COVERED

- Professional Services
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations (FM)
- Systems Integration
- Application Software Products
  - Vertical Industry-Specific
  - Cross-Industry
- Systems Software Products
  - Systems Control Software
  - Data Centre Management Software
- Processing Services Vendors
  - Transaction Services
  - Utility Services
  - Systems Operations (FM)
  - Other Processing Services
- Network Services
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information (Database) Services
- Telecommunications Services
- Turnkey Systems
  - Vertical Industry-Specific
  - Cross-Industry
- Third-Party Maintenance

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CLIENT SUPPORT

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- **"Hotline" Inquiry Service**

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- **On-Site Visits**

  An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

- **Client Meetings**

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RELATED SERVICES

- The Vendor Analysis Programme—U.S. provides company profiles and support data on U.S. and Canadian vendors.

- Market Analysis Programmes analyse and forecast the computer software and services markets in the U.S. and Europe.

- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.

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INPUT®

Special Report

Do You Want To Find Out How the Economic Slowdown Is Changing Your Market?

- How has the slowdown changed companies' purchase plans?
- How has it changed their spending plans?
- What are the recent trends in IS budgets, by industry?
- How should vendors and users react to the slowdown?

A Special Report from INPUT Details the Impacts of Economic Downturn on Your Business

Reacting to recent recessionary economic figures, INPUT has gone outside its planned research program to publish a Special Report on the likely impacts of the coming downturn.

Entitled *The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending*, the report covers in detail recessionary effects on systems and applications software; systems integration and operation; turnkey systems; and network, professional, and processing services.

The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending

Recession Impacts in General

- Organizationwide Planning and Spending
- Information Systems Budget Trends
- Forecast of Impacts on 1991 Spending
- Internal Information Systems Spending
- External Information Services Spending

Recession Impacts by Industry

- Manufacturing
- Banking/Finance
- Distribution
- Transportation
- Insurance
- State/Local Gov't.
- Services
- More...

Conclusions and Recommendations

- Implications for Information Systems Users
- Implications for Information Services Vendors

Demographics of Survey

But INPUT doesn't stop there. In a three-part organizational structure, the report first analyzes the general effects of the downturn. Secondly, it presents in-depth, industry-by-industry profiles to present a picture of the slowdown's effects on specific sectors of the economy. And thirdly, the report offers an expanded chapter containing INPUT's conclusions about the implications of a slowdown for IS users and for IS vendors.

A Substantial Savings

This report is a custom research effort designed to answer questions likely to have far-reaching impacts on how you do business. INPUT's data-gathering machinery gives you the facts you need to make informed decisions.

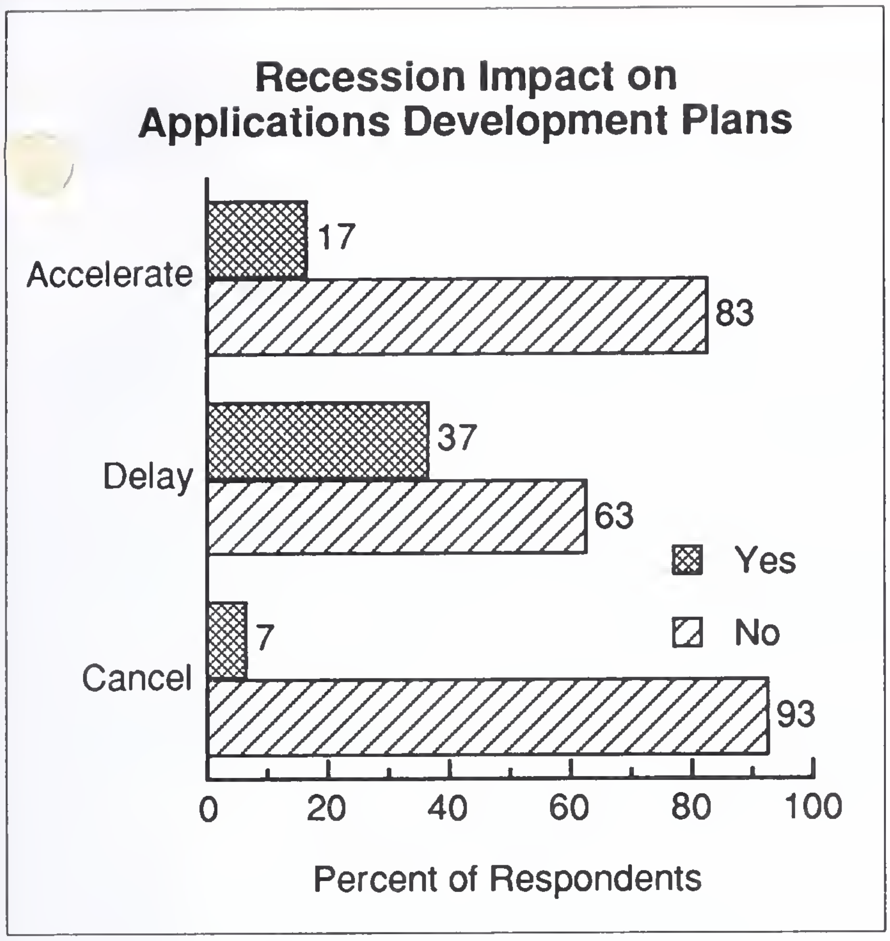
But you reap benefits beyond facts when you buy this report: you get the insights of industry experts who have seen, quantified, and analyzed many downturns in all relevant sectors of the economy.

Having this data and analysis at your fingertips would be a cost-effective tool at the regular retail price of $1,995 for the report.

But if you act before January 15, 1991, you'll pay $300 less than that regular list price —a savings of 15 percent!

Crucial Questions

INPUT has surveyed 100 organizations in many industry sectors to ask them the crucial questions about how companies that buy information services are planning to meet the challenge of the slowdown. The report asks each of the following questions, first about the market as a whole, and then again about each major vertical industry—Banking/Finance, Insurance, State and Local Government, Discrete Manufacturing, Process Manufacturing, Retail Distribution, Wholesale Distribution, and Transportation, among others.



This research protocol gives readers an unprecedented look at the general impacts of the impending slowdown, and the more specific effects on particular markets. The questions the report asks include:

- What are the specific impacts of recession on use of external information services?
- What are the specific plans of industries to obtain information services from outside vendors in 1991?
- Are companies using recessionary scenarios in their planning?
- If a recession happens, what are the likely impacts on specific information services?
- What are the leading organization-wide spending restrictions in place now?
- What will they be in 1991?
- Are information budgets up or down, and what forces are driving the trends?
- What are the three-year trends in system budgets from 1989 to 1991? What forces are driving those trends?
- What are the significant budget changes from 1990 to 1991 in staffing, hardware, software, outside services, and telecommunications?
- How are the multiyear trends in outside services budgets dovetailing with the multiyear system trend toward downsizing from mainframes to workstation-based client/server networks?

Each of these questions is answered in two different ways: for the overall market as a whole and for eight specific industries. The result provides an unprecedented picture—in general and in particular—of how the slowdown might affect your business during the next 12 months. In short, this report offers research that can give you a tremendous competitive advantage in shaping your own plans in a troubling economic environment.

INPUT®

The Hottest Available Research

This report, published in December of 1990, contains information that was collected, tabulated, and analyzed in November. It therefore represents the most accurate possible portrayal of how the markets in general, and various specific industries in particular, are changing their information services purchase plans to meet the demands of a changing economic picture.

This is the hottest research available to information services users and vendors right now—because INPUT is the only company to have initiated a comprehensive crash research program about a question that could have profound impacts on every aspect of your business.

And all you have to do to put this research to work for your company is use the enclosed order form to get your copy of the report today!

Call, fax, or mail your order to any INPUT office listed on the back of this brochure

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SUMMARY OF SERVICES

WHAT IS INPUT ?

INPUT is an independently held international market research and consulting firm based in Mountain View, California. The primary focus of the company is management planning. INPUT helps executives and managers globally to better understand their markets and the trends that could affect their businesses. Planning is the key element to success in the information systems and services industry, the markets INPUT tracks. This computer industry segment includes software, processing/network services, turnkey systems, and professional services.

INPUT was founded in 1974. To user and vendor companies in information services , Input provides leading-edge planning, forecasting, and analytical data. We are a stable and reliable source of *primary* research information. We do not simply compile data from other sources. Our staff includes top computer industry professionals, many with more than twenty years experience.

INPUT corporate headquarters,
Mountain View, California

WHAT WE DO

Our services are delivered in the form of research-based reports, ongoing information planning services, consulting, multiclient studies, conferences, newsletters, and much more. Many INPUT clients think of us as an extension of their own marketing or research departments. INPUT clients include the leading technology and Fortune 1000 companies worldwide, and these same companies are tracked by INPUT programs. Vital planning information is compiled from a *dependable* research methodology that ensures consistency.

Our mission is to provide our clients with accurate data in a timely fashion. We accomplish this via stringent research methods, client interaction, industry involvement, and analysis by our staff of top professionals from various computer industry sectors.

INPUT is a *full-service company*. We conduct sound research, analyze the results, deliver these results to the client in a timely fashion, and, most important, we stand behind the data. Excellence in every area is our creed, not just our motto.

STAFF PROFILE

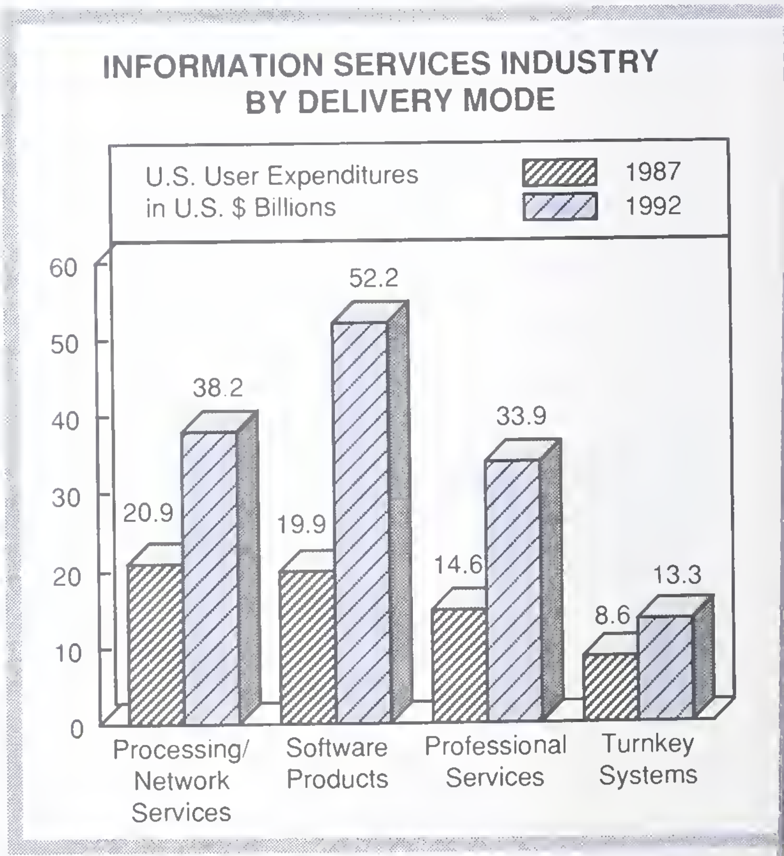
INPUT's staff of experienced professionals is our most valuable asset. The average experience level is over twenty years. Most of our people have held senior management positions in computer industry companies. Their backgrounds include positions in information services, telecommunications, information systems, customer service, marketing, planning, information processing, market research, and management. This diverse experience mix offers research perspective.

Moreover, many of our staff members hold advanced degrees from the most prestigious schools in the country. Top-notch education and hands-on senior-level experience combine to form an exemplary team.

INFORMATION SYST

INPUT tracks Information Systems and Services markets. These include:

- SYSTEMS INTEGRATION
- PROFESSIONAL SERVICES
- PROCESSING/NETWORK SERVICES
- SOFTWARE PRODUCTS
- TURNKEY SYSTEMS
- INFORMATION SYSTEMS
- CUSTOMER SERVICE



EMS AND SERVICES

INPUT PLANNING SERVICES

The information systems and services industry is such a fast-paced environment that many companies rely on INPUT for *ongoing* planning services. This is a mix of services for which a client pays a flat yearly fee. Included in a specific service are such elements as reports, on-call inquiry service, on-site presentation, INPUT conferences, use of INPUT information centers (worldwide), and the satisfaction of knowing INPUT senior consultants are available to answer pressing tactical and strategic planning questions. Currently, INPUT offers a family of planning services that meets the needs of specific information systems services segments. Each service has its own brochure and may be requested from any INPUT office.

INPUT REPORTS

INPUT produces a myriad of high-quality industry-specific and cross-industry market reports and issue studies. Primary research reports are key components of our family of planning services. The reports are also available to companies that are not yet INPUT Planning Service subscribers. These reports are more than just information—they are planning tools. Leading companies use our reports to set standards for internal research direction, plan for new markets or products, back up internal findings to management, and meet diverse individualized applications.

OUR RESEARCH METHODOLOGY

INPUT conducts *primary* research, meaning we orchestrate it from start to finish. We do not rely on other companies' work to come to a conclusion. We make conclusions on our own and we stand behind them. How do we differ from others? Our methodology.

INPUT research methodology uses two fundamental and complementary approaches.

1. INPUT conducts on-site, telephone, and mail interviews with decision makers in companies that purchase information services and information systems. Our interviewers are well trained and professional. Our survey results are checked and cross-checked.

2. INPUT monitors vendors with annual information services revenues in excess of ten million dollars. In addition, stratified random-sampling techniques are employed to estimate the size and number of companies smaller than ten million dollars.

Furthermore, INPUT augments this research with a formalized periodical monitoring system that captures secondary data—from more than 150 publications—for the INPUT information centers. We track some 3,700 vendors, and our data bases are continually updated. This means reliable planning data, consistently updated and captured in an effective manner.

PLANNING SERVICE PROGRAMS

- MARKET ANALYSIS AND PLANNING SERVICE (Information Services Industry)
- COMPANY ANALYSIS AND MONITORING SERVICE (Information Services Industry)
- SYSTEMS INTEGRATION PLANNING SERVICE
- FEDERAL INFORMATION SYSTEMS & SERVICES PROGRAM
- ELECTRONIC DATA INTERCHANGE PLANNING SERVICE
- INTEGRATED COMMUNICATIONS PLANNING SERVICE
- INFORMATION SYSTEMS PROGRAM
- CUSTOMER SERVICE PROGRAM (U.S.)
- CUSTOMER SERVICE PROGRAM (Europe)
- SOFTWARE AND SERVICES PROGRAM (Europe)

OTHER INPUT SERVICES

CUSTOM RESEARCH AND CONSULTING

INPUT also offers custom research and consulting for clients with specialized needs. INPUT's team of professionals can address the most complex issues pertaining to information systems and services.

MULTICLIENT STUDIES

INPUT also conducts multiclient studies that meet the common needs of several companies. These studies are helpful to firms that have niche-specific research requirements. Multi-client studies defray costs while meeting client requirements.

INPUT CONFERENCES

INPUT conducts a number of executive-level conferences and seminars covering most information industry issues. The basic premise of INPUT meetings is sharing information, with INPUT consultants and your industry peers. Meeting topics and an annual conference schedule are available from INPUT offices.

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